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MOVIE

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Comcasting NBC Opens Regulatory Floodgate

NBC, the oldest TV network in the U.S., has been rather restless in the past few years. First, in 2008, it attempted to do away with the pilots process. Then it tried to re-invent the upfronts with year-round presentations to clients. Finally, it decided to save money by replacing one hour of primetime drama with what used to be called "AM-radio" (talk show) programming. All those "innovations" lasted no more than a couple of sweeps periods, but the last one was the straw that broke the camel…sorry, the peacock's, back (the peacock is NBC logo). NBC is the General Electric-owned entertainment group that includes Universal Studios.

This year started out particularly rocky for NBC Universal when Jay Leno's 10 PM nightly experiment was

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Comedies, Cops and Copycats: U.S. Fall TV Pilot Trends

By Leah Hochbaum Rosner

Last year, one of the talks of the U.S. upfront TV season was how NBC's decision to grant Jay Leno a precious primetime slot was going to change the future of television. As the upfronts approach this year, most of the chatter has been reserved for the newest trends of the fall 2010 season — the unsurprising resurgence of sitcoms in a post-*Modern Family* world, the numerous reboots, the usual glut of cop and law shows — and the rather telling exclusion of sci-fi/fantasy series given that none of the loads of *Lost* copycats that have graced the airwaves in recent years have made much of an impact.

As of MIP time, 81 pilots had been commissioned by the Big Four networks

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Shaw: "Dumb Pipes" Not Content Without Content

Canada's deal that no one wanted turns hot

By Dom Serafini

In industry lingo, "dumb pipes" are distribution channels (cable, satellite, broadcast, broadband) that need to license programming in order to be properly monetized. To make such "pipes" content, Calgary, Canada-based Shaw Communications is following

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Indian TV Has Grown Too Fast By the Billion

By Dana Tilak

As late as 1990, the majority of television viewers in India received just one channel. If they lived in a large city, they may have been lucky enough to get two channels.

India is a very diverse country. There's an old saying: India changes language, culture and lifestyle every 100 kilometers. Two channels for a population as large and diverse as India's kept the country, simply put — content starved.

But when the change finally came, it happened nearly overnight. In 1991, the Gulf War resulted in CNN's satellite coverage being brought to India. Shortly thereafter, Hong Kong-based Satellite Television Asian Region (Star), which is now part of News Corporation, introduced five new channels. According to the Museum of Broadcast Communications of Chicago, "by early 1992, nearly half a million Indian households were receiving StarTV telecasts." This proliferation continued at an exponential rate, and India is now home to more than 500

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Century Plaza To Shed Top Floors

The Century Plaza which, together with the Intercontinental, makes up the pillar hotels for the L.A. Screenings, is back in the news. New plans call for "sensitive rehabilitation" of the hotel to preserve 400 of the hotel's 726 rooms, by converting those on the top floors to 45 condos. In addition, meeting space would be reduced, and a slightly smaller ballroom would replace the existing one. The Century Plaza Hotel, a Los Angeles landmark, was recently saved from the wrecking ball by the National Trust for Historic Preservation and the Los Angeles City Council. With the support of concerned citizens, the two city organizations intervened in the demolition of the hotel by the owner: real estate developer Michael Rosenfeld. Rosenfeld had planned to raze the Century Plaza to make way for two 50-story high-rises that would house condos, offices, a boutique hotel and shops. Los Angeles' city councilman Paul Koretz, who represents the Century City neighborhood (an area in the heart of Los Angeles), led the negotiations with Rosenfeld, resulting in a compromise that will save over half of the hotel's rooms.

The Century Plaza was designed by Minoru Yamasaki and has been an industry hotspot since its opening in 1966. It plays a central role in May's L.A. Screenings, playing host to network events and indie screenings alike. In response to the controversy, the National Trust for Historic Preservation has added the hotel to its annual list of America's 11 most endangered historic sites.

Click 'n Buy, New TV Shows Tool

Hyperspots has launched Advertising by Choice, a new technology used to generate new advertising opportunities online for TV shows. The approach is geared towards viewers who are willing to learn more about the products featured on TV shows and, possibly, buy the items with three easy clicks.

Rather than using ads that interrupt the viewing experience, Hyperspots allows viewers to click on the item they see anytime and anywhere during the show to get more information about it. The system allows content owners to monetize the images and video they distribute online, making every element of a picture or video-frame clickable. Once an item is clicked on, information about its cost and how to buy it appears on the screen.

"Viewers are already watching content online by the millions," Hyperspots Marketing vp Alain Teale said. "However, everyone is still looking for that effective way to integrate the entertainment, the store and the sale all in one place, and Hyperspots has done just that, generating new revenue streams for all content publishers, content owners, content producers, brands and retailers alike."

Hyperspots CEO Scott Mahoney added, "Advertising by Choice changes everything. Now the viewer gets to choose the product he wants unobtrusively and as a result advertisers will be able to put their message in front of the right person at the right time."

TiVo Upgrades Its Set-Top Box

TiVo Inc. has unveiled a new set-top box (STB) that will allow viewers to watch streaming videos from a variety of sources on their television. The so-called "Premiere" box debuts this month and will cost around $300. This is the first device that allows people to watch both regular broadcast television as well as Web videos from sites like YouTube and Netflix. In the past, TiVo's STB only operated as a recording device, allowing users to store, playback, fast forward and rewind their favorite shows.

TiVo's "Premiere" model holds 45 hours of high-definition content, but customers can pay $500 for an increase to 150 hours. Research analysts are speculating that the new device will prompt consumers who already own TiVos to upgrade to the new model, rather than bring in new buyers. TiVo has partnerships with MSO Comcast, cable provider RCN, which services

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the northeastern U.S., and U.K.-based Virgin Media, but the "Premiere" will only be distributed by RCN this year.

In other TiVo news, the company recently won a federal court ruling over EchoStar's Dish Network. The case, which was decided by the U.S. Court of Appeals for the Eastern District of Texas, concerned patent infringement by EchoStar's digital video recorders. TiVo stands to collect more than $300 million in damages from EchoStar.

U.S. Studios And Piracy War

The Hollywood Studios have teamed up with governments in the E.U., U.K., Mexico, Korea and Japan to crack down on Internet piracy. A controversial new copyright treaty, called The Anti-Counterfeiting Trade Agreement (ACTA), is currently in the works, and will purportedly introduce tough new measures to combat illegal downloading, file-sharing and secret monitoring. As a result of the treaty, the details of which remained confidential as of press time, pirates of film, music and games will be subject to harsh fines and, if warranted, possible prison sentences.

The impending treaty has been met with worldwide criticism. Particularly divisive is a provision under discussion that would allow Internet service providers (ISPs) to secretly monitor and report users transferring unusually large chunks of data. In turn, entertainment companies would be able to take legal action.

The response to ACTA has been particularly negative in Europe and the U.K., where ISPs are concerned that its regulations could lead to criminal sanctions for illegal downloaders, rather than the civil suits of the past. European privacy watchdogs put out an official warning about the agreement, cautioning against regulations that are too intrusive on privacy and data protection. Additionally, members of Parliament in the U.K. have demanded that the government release details of the negotiations to the House of Commons.

Viacom and Hulu Split

As of early March, Viacom pulled its programming off Hulu, the Web-based streaming video site owned by NBC and Disney. The split cost Hulu such programs as *The Daily Show With Jon Stewart* and *The Colbert Report*, as well as other Comedy Central shows.

The decision came as a result of Viacom's inability to reach a deal with Hulu on a fair license fee. Though the divide is said to be amicable, it could prove to be a great loss to Hulu, which ranks *The Daily Show* as its third top program. In lieu of Hulu, Comedy Central will now stream its content on the shows' official branded sites such as TheDailyShow.com and ColbertNation.com.

Though fans of the Comedy Central programs may be angered by their removal from the site, they might be mollified to hear of speculation from analysts that Hulu is unprofitable. Content owners split ad revenue with the site, typically receiving 50 to 70 percent. Though Hulu gets more than 44 million visitors a month, the ad sales staff is reportedly having a hard time monetizing its burgeoning numbers.

Venezuela's Opposition To TV Censorship

A ban on six TV stations in Venezuela provoked widespread student protests throughout Caracas in January. Marchers from four universities took to the streets following the announcement that cable companies were dropping the stations in compliance with a government order. Demonstrators asserted that the ban reflected an effort by the country's president, Hugo Chávez, to silence political opposition, particularly the vocal critics on Radio Caracas Television (RCTV). The increasingly unpopular dictator appears to be concerned that he might be ousted in the upcoming September 2010 election.

The Venezuelan government issued statements claiming that the reason behind the ban was that stations had broken telecommunications laws. The regulations purportedly violated by RCTV and other channels mandate that networks classified as "national media outlets" must air Chávez's speeches and other government announcements. Free press advocates have declared that the measures enable government propaganda, and are especially unfair

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when applied to the president's speeches, which often last hours.

Over the course of the protest, one student was killed and nine policemen were injured. Similar protests were held in Merida, Valencia, Ciudad Guayana and Maracaibo. The Chávez administration has lately faced criticism related to inflation, banking scandals and power outages. Local analysts are now even venturing that Chávez's chances for reelection — if they were to be fair — are "shaky."

Ad Spend Shows Two Trends

At JEGI's sixth annual Media and Technology Conference, held in New York City in late January, two key advertising developments came to light. JEGI is a New York City-based investment bank for media.

Agencies that buy secondary (non-premium) ad inventory are being revolutionized by demand-side platforms and user-level targeting data providers, such as Washington State-based BlueKai and New York-based eXelate. These data exchange companies separate data (which directly influences targeting capabilities) from media (where ads show up).

Currently, spending by agencies on these exchanges is small, but the expectation is that within two years, a significant percentage of media budget — perhaps up to 30 percent or more — will move from network buys to exchanges.

At JEGI's conference, Gian Fulgoni, chairman of the Virginia-based comScore, raised the notion that online advertising is leaving branding dollars behind. comScore is a marketing research company that provides marketing data and services to Internet businesses. Branding is advertising with a strong emphasis on the company brand (logo and/or company name). Branding advertising campaigns are highly successful at inducing consumers to pay, for example, $70 for a T-shirt that costs less than $1 to make.

According to Fulgoni, in 2008, 63 percent of all media spending was on branding, but online accounted for only five percent ($6 billion) of branding dollars. "The consumer is often motivated by emotion, causing a shift away from click rate metrics to a growing recognition of the impact of branding," commented Fulgoni.

Sir Robert Phillis 1945-2009

Bob Phillis, former deputy director-general of the BBC, passed away December 22, 2009 of bone marrow cancer. The industry remembers him as the managing director of Central Television in the 1980s, one of the top executives at Carlton Communications (1987), CEO of news agency ITN (1991), deputy director-general of the BBC (1993) and head of BBC Enterprises (now BBC Worldwide).

Bob's background was in print. He was an apprentice printer during his school years and, before moving to Central Television in 1981, ran the Independent Television Publication company (publisher of *TV Times*). Phillis returned to print in 1997 as CEO of the Guardian Media Group. He was knighted in 2004, and resigned from GMG in 2006 when he was diagnosed with bone marrow cancer.

No matter where he was in his career, Phillis never failed to meet with *VideoAge*'s journalists. He is fondly remembered as a fan of our publication, and as one of the few Brits who was truly a friend of America and of Italians. He was one of the sponsors of our editor, Dom Serafini, for the latter's membership in the Royal Television Society, an organization that he chaired from 1989 to 1992. We first met Phillis, in 1985 when he was featured on the front cover of *VideoAge*'s April issue.

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comScore Takes Aim At Nielsen

ComScore, a Virginia-based Web-measurement and marketing research company with offices all over the world, has expanded its team with the hire of former Arbitron executive Joan Fitzgerald.

Arbitron — where Fitzgerald served as vice president of Television Sales and Business Development — is a radio and TV ratings company with many locations throughout the U.S. It is well known for its radio research and for having provided data services to NBC Universal during the Olympics. Analysts are speculating that Fitzgerald's appointment represents comScore's desire to break into the cable, satellite, telco and set-top maker research markets in order to challenge Nielsen Co. as the leading media measurement firm.

However, if comScore is to take aim at Nielson, it may take more than hiring experienced professionals. The U.S. market for measurement companies has recently been flooded with competitors, some of whom already gather data from more than 70 million set-top boxes. On the other hand, since the rise of the Internet, one streamlined method for gathering viewer data has yet to emerge. In their marketing research, companies currently piece together information from a variety of firms. comScore and its many rivals hope to develop a system to fill this void.

Viacom, News Corp Now Vie For India

Hot on the heels of Disney, Sony and Warner Bros., U.S.-based media conglomerates Viacom and News Corp are stepping up the competition for supremacy in the Indian television market. Both companies are now tackling two cultural mainstays: cricket and Bollywood. News Corp's Star Plus has been in the region for nine years, and its forecasted revenue for 2010 is the equivalent of U.S. $180 million. Recently, Viacom's Indian company, Colors, swooped in and usurped the top Hindi general entertainment ratings slot from Star. In response, Star is planning a Bollywood awards show, which will feature the genre's top stars and hopefully prove to be a ratings juggernaut.

Meanwhile, Colors, a co-venture with India's Network18, is launching a variety of reality shows based on the Indian Premier League of cricket. The channel has also secured licensing for the IPL cricket tournament and has its own Bollywood-inspired series in the works.

In addition to Star and Colors, the Indian branches of Sony and Warner Bros.' Turner are competing for a piece of the Indian TV market pie. Their attempts to garner ratings have lately consisted of Bollywood-style soaps and reality shows.

ITV Reports Profits For '09

U.K. broadcaster ITV reported an annual profit of £25 million (about U.S. $37.4 million) in 2009. The profit represents a drastic rebound for the company, which lost £2.7 billion (about U.S. $4 billion) in 2008, which many are calling the worst year for TV advertising on record.

Now, however, things seem to be turning around. The network reported a seven percent improvement in ad revenues in the first three months of 2010 and predicts even greater growth on the horizon. Interim chief executive John Cresswell forecast that ad revenue will bounce back by 15 or 20 percent in April, driven by a recovery in retail and food advertising. Nevertheless, ITV remains £612 million in debt (U.S. $915 million).

In other ITV news, the broadcaster also announced an official start date for its new chief executive Adam Crozier. Crozier, who is currently the chief executive of Royal Mail, will officially take his post on April 26. He replaces former executive chairman Michael Grade. ITV also has a new management team led by Archie Norman, another new hire who assumed his role in January.

Famous Quotes

"Reporting on the entertainment business is one of the most bewildering tasks in journalism: no one talks"

Vanessa Grigoriadis reviewing "Star," a book on Warren Beatty for *The New York Times Book Review.*

Letters

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Michel Zgarka
Montreal, Canada


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Canada's TV is Not Complex. The Way It is Portrayed Is

Getting through the 296 pages of the book **Broadcasting Policy in Canada** (2010, University of Toronto Press) wasn't easy, and this reviewer must admit to having skipped a few lines here and there. It is obvious that the 15 chapters that author Robert Armstrong put together for the University of Toronto Press was more a labor of love than riches, because it's hard to imagine that the paperback will rise to *The New York Times*' bestseller list.

In the book, sold at C$20, Armstrong is introduced as the president of Communications Media in Montreal. Google couldn't shed light on his company, but *VideoAge* was able to find out that he's a former part-time teacher in the Department of Communication Studies at Concordia University in Montreal and, by calling the publishing company, we learned that he's a former Telefilm Canada executive who now consults from home.

The preface explains that the book "examines government policies related to broadcasting in Canada and the strategy in place to safeguard and strengthen the Canadian broadcasting system." It also points out that "broadcasting is the only regulated cultural medium in Canada."

The book is current to July 2009, and thus no recent developments (like the Shaw-CanWest deal) are anticipated in it.

The eight-page glossary offers a quick reference point, especially when one has to remember the difference between "category one" and "category two" services. It points out that those categories will disappear as of August 31, 2011 and be replaced with Category A and B, indicating TV services with access and without access rights, respectively.

Throughout the book, readers also discover that, in the 2007-2008 TV season, the total volume of Canadian independent television production was over C$2 billion, in a chart that was divided by category.

Indeed, the 30 charts and nine tables that illustrate the book are very helpful to understand Canada's TV sector, especially the "Summary of Canadian Content and Expenditure Requirements" chart.

Topics covered in the book include "Canadian Content Requirements," "Financing Canadian Content," and "Copyright, Broadcasting and the Internet."

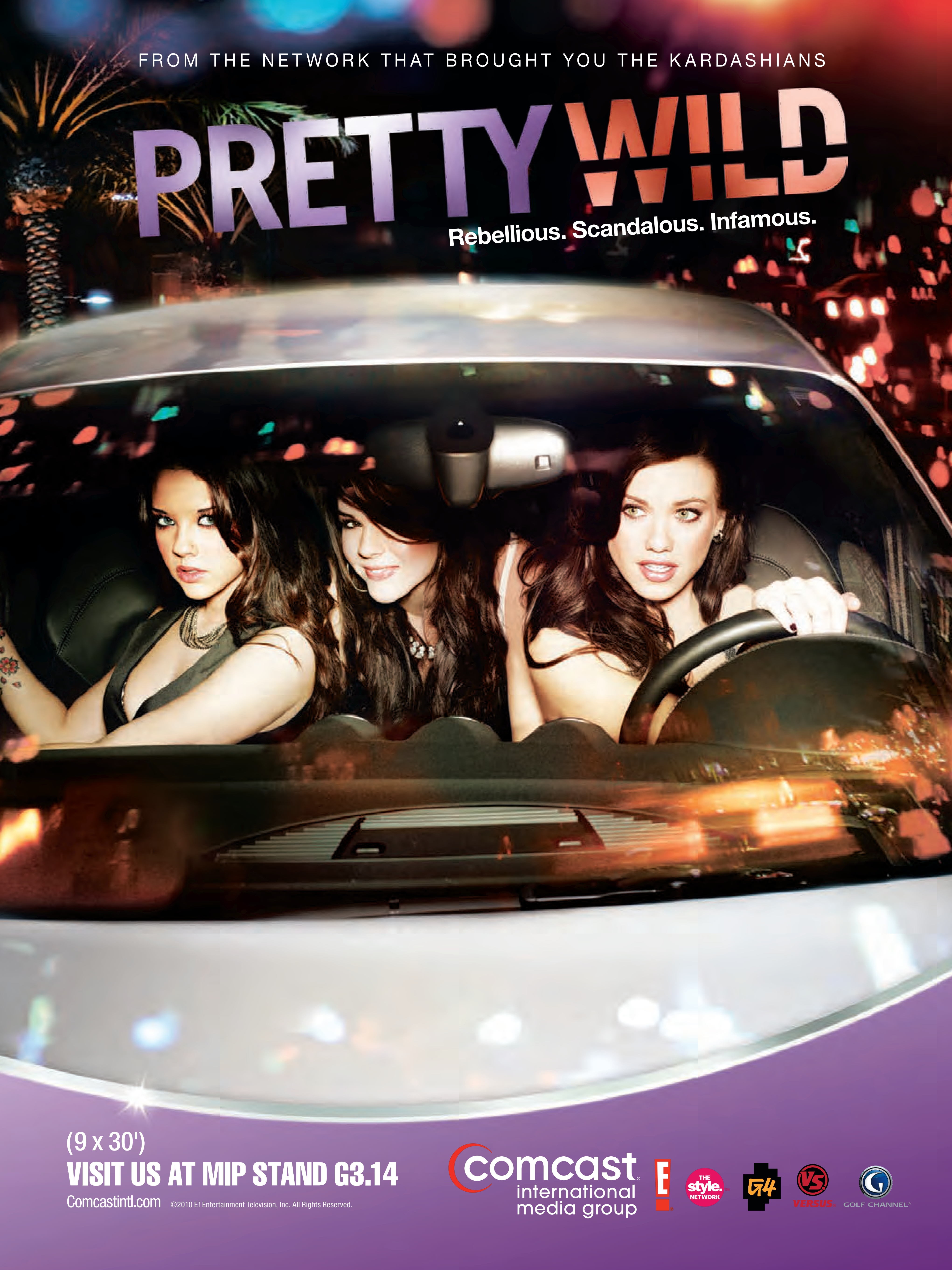
In a chapter titled "Canadian Ownership and Competition Policy," Armstrong gives a voice to the *laissez-faire* Chicago economics school doctrine that "barriers to entry may produce concentrated industries and 'imperfect' competition."

As a former Telefilm executive, Armstrong is rather critical of Telefilm Canada: "[…] Telefilm has become a secondary player in television insofar as Telefilm no longer exercises significant policy or decision-making powers in the broadcasting sector."

In his "Conclusion" chapter, Armstrong reiterates that, "Given the challenge provided by unregulated new media to the regulated broadcasting environment [….] the CRTC [Canada's TV authority] should reduce or eliminate its regulation of the Canadian broadcasting system in favor of little or no supervision." In the book's final paragraph, he states that, "new media are slowly strangling the goose that lays the golden eggs. Unless a solution to this structural problem is developed, the continued availability of high-quality Canadian [contents], which are so essential to Canadian identity, appears to be highly problematic."

Also problematic is figuring out to whom this book is directed. At first sight, it cannot be Canadian TV executives, since it's not a TV trade book (not one TV executive is quoted or mentioned in the book). It also cannot be directed at academia, because it's not boring enough.

The only remaining target audience could be non-Canadian TV experts in need of a quick reference tool. **DS**



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In Exchange For Some Needed Cash, Market Sold Its Sparkle

Claudia Sahab, director of Europe for Televisa Internacional

Even though it is not easy to spot, the official theme of this edition of MIP-TV and derivatives, such as MipDoc (all taking place April 10-16 in Cannes), is "Charting the Next Decade." "Focus on China" provided the spring sparkle in 2009, and "Rethinking" offered the Fall guidance. Perhaps, looking at the next decade, attendees at this MIP face a show whose main attraction is a new event geared towards formats.

The theme also reflects the somber attitude with which many are approaching the once carefree market. Nevertheless, the consensus seems to be that this year's MIP is an opportunity for companies to bounce back from a shaky 2009, and it's not to be taken lightly.

The premiere of the event dubbed "MIPFormats" is described by organizers as "a one-day premium business conference and pitching forum, designed for producers, commissioners, brands and aspiring creators of breakthrough entertainment formats." MIPFormats is set to take place April 11, on the eve of opening day for MIP proper, overlapping with MipDoc, which runs April 10-11.

Although the market will be less flashy than in years past, the feeling amongst executives interviewed was that there is reason to be optimistic.

However, this time around the key issue facing the market is not the economy, but its place in the calendar year, since it presents a recurrent problem for big studios the world over. Such companies depend on May's L.A. Screenings for new product, and this year the proximity of the two events is proving to be an obstacle. While the studios readily acknowledge that MIPCOM is their best TV trade show, they also admit that MIP-TV's dates represent a problem. "It would be great if MIP could move to early March. Then, it could make more sense for us," commented the president of a major U.S. studio who asked that his name not be used.

Naturally, MIP-TV organizers have to squeeze the TV event in before MIPIM, a large real estate market which is held in Cannes in mid-March, and at the same time, keep it far away from both the Easter and Passover holidays — not an easy task.

On the other hand, organizers could continue with the April start-date, banking on the fact that MIP is popular among smaller companies. Then again, it's most likely the presence of the large TV studios that attract so many buyers in the first place — something the studios are quick to point out.

According to one major European buyer, "Disney and Warner are not sending their European sales teams. The other majors are attending. For us, that means around 70 meetings, mostly with independent distributors."

Despite the dearth of studios, MIP can expect a strong showing from smaller companies and indies. Claudia Sahab, Televisa Internacional's director of Europe, who works out of the company's Spain office, had high hopes. "I'm sure that this year will be busier than the last," she said. Over the course of 2009, she said, Televisa saw huge growth in its ready-made series sector, a side effect of production budget cuts. As a response to dwindling funds, "Countries like Hungary started buying ready-made telenovelas again,"

Nat Abraham, head of Distribution, Breakthrough Entertainment

she said. Sahab expects this trend to continue in 2010, and help bolster Televisa's business at MIP. Additionally, she noted that the analog switch-off currently taking place across Europe is proving to be a very good thing for product sellers. "Everything will soon be on DTT (digital terrestrial television) and have two or three more channels," she said, "So broadcasters will need more content."

Saralo MacGregor, L.A.-based vice president of Worldwide Distribution for the U.K.'s Fireworks International, concurred that this MIP-TV will be a busy one. Fireworks will be launching a range of titles, including the fourth season of drama series *Heartland* and new reality series *Wildlife Rescue Africa*. Regarding the global economy, MacGregor was realistic. "Broadcasters might be operating with reduced budgets," she said, "But there are still schedules to fill."

Other TV execs from Los Angeles were gung-ho about the market. GRB Entertainment's svp, International Distribution, Marielle Zuccarelli, remarked, "Buying is definitely back, and we're confident that MIP-TV will be a strong market." Zuccarelli is bringing a full team to Cannes, and plans to hit the ground running with a host of new shows as well as a number of already successful series. *Semi-Homemade Cooking With Sandra Lee* and *Money Saving Meals* top GRB's slate.

Of the late market date, Zuccarelli stated that it makes no difference to her company because the firm plans to have a different focus for each market. "At the L.A. Screenings we focus on Latin American buyers that are not attending MIP-TV," she said.

Another L.A. exec, Jon Kramer, CEO of Rive Gauche Television, said of the delayed opening: "I'd like to see MIP at the end of March, although it's hard to tell if it makes a difference." He went on to point out that the later the conference falls in the year, the better the idea programmers have of what the first quarter looked like and can make decisions accordingly.

Although he's already a seasoned MIP-TV veteran, Ken Dubow, founder and president of new L.A.-based Opus Distribution, explained that "this will be the first TV market for Opus Distribution with product to deliver, so it's an exciting time." As a new company, Opus has a full plate for the market, and Dubow named cash flow as his firm's biggest challenge. "Cash is still tight around the world," he said, "But there seems to be some thawing going on with budgets." Opus' inaugural MIP slate includes TV movies and documentaries, including a new romance feature starring Alyssa Milano.

The Canadian contingent will be out in full force as well, though whether they'll attend Tuesday morning's "Connect with Canada — Producers Matchmaking" event remains to be seen. Les Harris, president of Toronto-based Canamedia, said his company will be highlighting HD programming. Harris was also optimistic about attendance figures. "From what I understand, MIP-TV last year was dead," he said, "MIPCOM had more people, but the people who were there seemed serious. I'm hoping that the trend we saw starting at MIPCOM will continue at MIP-TV this year."

Another Canadian company, Toronto's Fremantle Corp., is looking forward to touching base with its traditional broadcast clients as well as embracing the new digital world. The Fremantle team will be set up in the Palais presenting a new miniseries called *Doc West*, automobile/lifestyle shows *Hot Import Night* and *Dream Car Garage*, new series *Healthy Gourmet* and much more. Randy Zalkin, president of Fremantle Corp., predicted that attendees can expect a significant core of new and returning buyers. "Given the rollercoaster ride that the world economy is undergoing, some regions

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will be in hibernation, but others have awakened hungry with an appetite to consume, however cautiously."

Nat Abraham, head of distribution for Toronto-based Breakthrough Entertainment was similarly buoyant. "The global economy is bouncing back quite well," he said, elaborating, "Last year taught people a few critical lessons about who they should be sending to the market." Where product is concerned, Breakthrough hopes to promote a variety of series, including documentary program *Tooned!*, an ode to Saturday morning cartoons and their effects on pop culture. Abraham also pointed out that MIPCOM and MIP-TV have built up differing rosters of participants in recent years. MIPCOM, and its accompanying event MIP Jr., bring out the kids' programming crowd, while MIP-TV remains documentary and factual-program driven.

Nevertheless, a number of companies specializing in children's TV will still be on hand. One such company is Qatar-based JCC Children's Channel, a pan-Arab entertainment channel directed at kids ages 7-15. JCC will be at MIP with a new science magazine program co-produced with Japan's NHK and NED, as well as host of distribution opportunities for production and co-production. "We hope to see better attendance than last year, diverse content from around the world and more representation of the Arab world," commented a JCC spokesperson.

For those who make the trip to Cannes on Sunday, MIPFormats has a packed day on tap. Unknowns as well as well-established producers

Saralo MacGregor, vice president of Worldwide Distribution for Fireworks International

will have a chance to propose their projects at the Fresh Talent Pitch. A seminar entitled "How Formats Are Valued in the Market" will provide stats on the risks and rewards of the format biz. And "The Big Picture — The Majors: Acting Local, Thinking Global" will take a look at the big U.S. and U.K. studios and how their format departments work. Networking opportunities and cocktails will also be peppered throughout the day.

Regular market activities kick off on Monday, April 12. Day one promises to be a flurry of digital activity. The Opening Night Cocktail at the Martinez Hotel will also play host to the International Digital Emmy Awards. The Digital VIP Summit and a seminar entitled "Twitter+TV: How Real-Time Engagement is Changing Content" will continue throughout the day. New media will once again be a hot topic all week long, with seminars and panels like "Will Social Media Drive Mainstream Media?" "Changing Advertising Models" and "Next Generation Online Video Experience," taking on digital from all angles.

Throughout the week, a handful of speakers including Ben Silverman (formerly of NBC) will also take the stage for a series of "Media Mastermind Keynotes." Other speakers include Tim Kring, executive producer and creator of popular U.S. network series *Heroes* and Jeremy Darroch, chief executive of Sky.

According to event organizers Reed Midem, MIP-TV 2010 boasts 11,500 participants from 102 countries including 4,000 international buyers. Around 1,500 exhibiting companies will occupy 470 stands, and the conference program will feature more than 45 sessions, keynotes, screenings and matchmaking events. Last year's market saw 11,500 participants from 105 countries. **ES**

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with host Thom Filicia
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With The Miami Move, Mart Has Nowhere To Go But Up

By Karen Ruttner

Ultimately, NATPE will succeed one way or another, if only by default. The selection of Miami, Florida, as the 2011 venue was received with much enthusiasm, as it will finally force NATPE to reshape itself as a fully international event. Until now, and despite the fact that NATPE's market is 99 percent international, its organizers did not acknowledge this element at the seminar and awards levels, nor did they focus on relevant international topics in their Daily newsletters, instead relying heavily on coverage of domestic (i.e., U.S.) television.

With that in mind, it's likely that some of the international companies present at this year's event were there simply to avoid losing exhibiting privileges in Miami. It should be noted, however, that Miami was not NATPE's first choice. The event is moving in 2011 because its preferred venue in Las Vegas was not going to be completed in time.

Out of the 56 seminars held this year, only seven were somewhat related to international TV. NATPE even nixed the idea for the one domestic seminar — about TV stations' extra digital channels — that would have benefited international producers and distributors. On the awards side, none were devoted to international TV executives, much to their chagrin.

At the exhibitors' level, this year's NATPE managed to alienate Disney, which having not found a satisfactory arrangement, decided to forgo the event altogether as Sony did a few years back.

As far as the overall assessment of NATPE 2010 is concerned, the outcome wasn't rosy, but consensus seems to be that the market has hit bottom and now has nowhere to go but up. NATPE's organizers objected to *VideoAge* Daily's report of an estimated 2,000 total participants over the three-day market that started on Monday, January 25. *VideoAge* based its figures on the count provided by THEhotel and Mandalay Bay when the Daily was delivered to all registered participants.

Ironically, *VideoAge*'s reporting is

CableReady's Gary Lico at his stand

considered "too negative" by NATPE management, ignoring the fact that it reflects the opinions of many TV executives, including the heads of the U.S. studios' international TV divisions, that NATPE gathered directly.

The conference boasted a raft of star-studded panels (think Hugh Laurie, Donald Trump, Judge Judy and more). Even so, words like "unrest" and "discontent" were creeping into the exhibitors' lexicon.

The main divide was found between those exhibitors relegated to the market floor versus those in the THEhotel tower suites. *VideoAge* surveyed a number of the companies present to gauge their reactions to the location differentials and the event in general.

The vibe on the floor was predominantly negative. When asked how things had been going for TOEI Animation, sales manager for Latin America Eduardo Lucio merely said, "Actually very slow. I'm disappointed really." Was the trip to Vegas worthwhile for them? "No," Lucio said. "Not really."

A few stands over, Rafael Fusaro, president, and Maria A. Martinez, svp and COO of APA International Film Distributors expressed similar frustration. "The music [from the nearby Digital Theater, a stage used for presentations] is too loud," Fusaro said. "It's not good for speaking. The Digital

Telefilms' Ricardo Costianovsky, Humberto Delmas, Tomas Darcyl, Alfredo Andreotti, Alejandro Carballo

E1's Valerie Cabrera

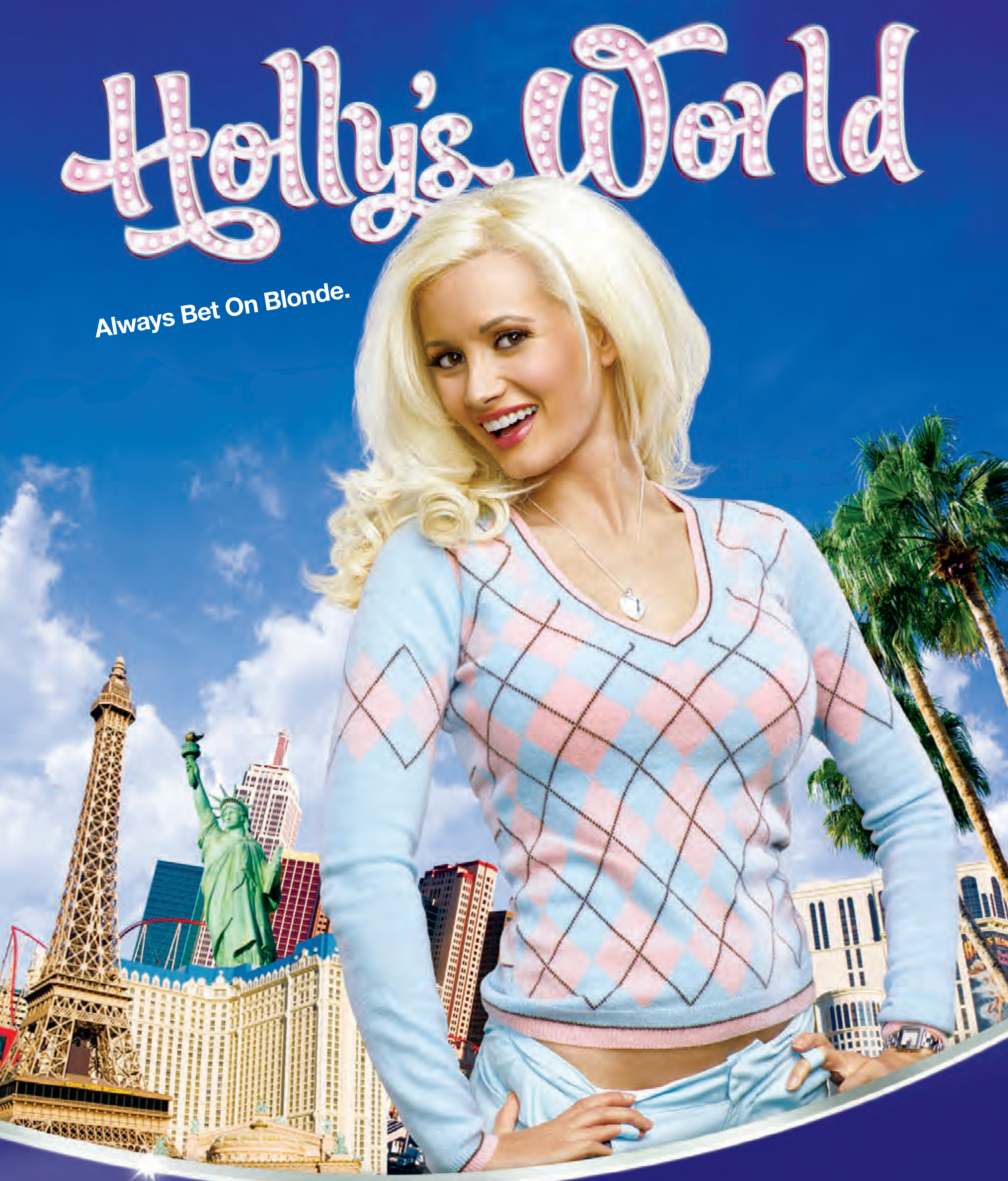
Theater shouldn't be where the sellers are. We didn't know it would be here." The APA team was divided in terms of optimism for the 2011 move to Miami, despite the fact that their offices are located there. "There's more to do, activity wise and entertainment wise in Vegas than Miami," Martinez explained. "Vegas is used to conventions." Fusaro was quick to counter though, adding with a smile, "Europeans like to go to Miami more than Vegas."

European approval is certainly something that NATPE should be concerned with, especially considering comments from people like Beatrice Grossman Conforti, head of Business Affairs for Switzerland's RSI. "More attention needs to be paid to European producers," she expressed. "Buyers come [to NATPE] to meet with the U.S. majors, mainly. There must be a little bit of interest shown to Europeans. The organization claims to be an American market. After this crisis, though, maybe a little bit of European old culture could be good for everybody." That said, Grossman is somewhat optimistic about the forthcoming location shift. "I don't know if Miami will be better, but it will definitely be a shorter trip for the Europeans."

Rob Molloy, director of Television for London, UK-based Guinness World Records addressed the conference focus as well. "This has moved more towards catering to Latin America. NATPE should address this and force everyone back to the show floor. Everyone is all doom and gloom, saying NATPE is dying. I don't agree. The business of television has changed." So, considering the business is changing, does Molloy think the moves NATPE has made of late are sufficiently addressing the shift? In regards to this year's event, he commented, "We were pleasantly surprised [Monday] morning. When we initially saw the buyers list we were a bit skeptical. We have an agent specifically for Latin America, so we're not here for that. And business definitely slowed that afternoon and even more so today [day three]."

Maria Lucia Hernandez Frieri of Colombia's RCN said, "This has been a very good market. All of our clients have come as previously arranged, and we had a few people come in to request meetings." Hernandez's statement, albeit positive, included shades of what seemed to be inherently wrong with

(Continued on Page 22)



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(Continued from Page 20)

Lionsgate's Peter Iacono and Kevin Beggs

the market this year. With the general sentiment that suites don't work well unless one has appointments set in advance, saying that business was good because all of the company's previously scheduled appointments showed up is not a particularly convincing argument.

Comcast's Gary Forsyth and Fireworks' Greg Phillips echoed RCN's satisfaction, noting, "This market has been good" and "We're completely satisfied," respectively. Phillips added, "We've done enough sales and had enough strategic meetings to have made this market extremely worthwhile. It's been NATPE business as usual."

But what exactly is NATPE business as usual? Because as Guinness World Record's Molloy had said earlier, "NATPE has definitely gotten smaller. If it stayed [in Vegas] next year, we'd think twice about coming."

Steven Park, senior sales manager in Korea's KBS Media International Business Department was similarly hesitant with his feelings. While he said that business had been good for KBS this year, and that it has been on par with their past six attendances, all he could muster in terms of enthusiasm for Miami was, "I think [it will be better], yeah." Park's biggest complaints about 2010's event were echoes of our other respondents. "It's been a little bit noisy on the floor," he commented. "But, moving to an all-suite format would also have its defects. Buyers have difficulty in the suites. If you don't have an appointment, it's difficult getting in there."

Image Entertainment's Steve Saltman, GMX's Don Golden, Barbara Gomperz-McCarney

Also bothered by the Digital Theater located within shouting distance of the market stalls was Bill Xiaoming Du of China's Star-D Productions. This was his second year at NATPE, and felt that his coming was "probably a bad thing." He said, "Compared to last year, it's been very quiet [business-wise]. The Digital Theater has been kind of a problem. That's a bit loud. And — I can't find a cafeteria!" That said, Du added that Star-D will definitely be attending the 2011 affair in Miami.

For smaller companies like Animation Dance Association, who made their NATPE debut this year, "Markets are very useful because you can just stay in one place and people come to you," explained CEO Alexander Vasilkin. "It saves a lot of time." But comments like Vasilkin's only apply in a stand scenario, because as outlined by the other companies' we spoke to, buyers are less likely to casually walk into suites without preset appointments.

Fremantle Corp.'s Randy Zalken, Irv Holender


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South Africa to Help Make Football a U.S. TV Sport

By Yuri Serafini

Unless one lives under a rock or in the United States' Anglo world, by now one has heard that FIFA's football World Cup will be held in South Africa June 11-July 11. Across the globe, more than 150 different broadcasters, representing a similar number of countries, will be making sure that anyone anywhere will be able to watch the tournament. More or less, that is.

Many TV networks around the world can broadcast extensive coverage of as many matches as they choose to. But a good number of broadcasters will be limited in the number of matches they will be able to air, depending on what sort of package deal they worked out with FIFA. For example, Italy's public broadcaster RAI is only licensed to air one match per day, while satellite TV platform SKY Italia will show every single game to its subscribers. France's TF1 has a similar deal worked out — it can broadcast up to 27 matches — while the satellite, cable, and IPTV pay platform Canal+ will broadcast all games.

Broadcasters paid for packages based on the matches' dates, rather than on the teams involved. This isn't much of a problem for the U.S. Anglo networks, where viewing figures will be low regardless of which teams are playing. But those broadcasters in other parts of the world that only bought a select number of matches to be played later in the tournament will have to hope their country's team makes it as far as those late stages, or risk lower-than-expected ratings.

It's not likely that New Zealand's TVNZ will be banking on its home team making it very far. But France's TF1, Italy's RAI, and Germany's RTL will be airing a limited number of matches, and they obviously want their teams to play in as many of those as possible. This proves a problem for FIFA too, since it wants the heavyweights to stay in the running as long as they can, so as to maximize viewer interest.

As such, FIFA, the football world's governing body, came up with the solution. In reality, the matches from the eight initial groups were not picked randomly (even if FIFA insists that they were randomly selected). FIFA placed all the teams into four "pots." One pot was for the world's top eight ranked teams. The other three pots were geographically organized: One for North America and Asia, one for Europe, and one for South America and Africa.

When the matches for each of the eight groups were decided, one team was taken from each pot, thus assuring at least one top-ranking team per group. This way FIFA was able to satisfy broadcasters' needs from the major football countries.

Also, because one group's first-place team plays the next group's second-place team in rounds of 16, immediately following the group eliminations, the big football countries (and their broadcasters) basically have an easy ride to the quarter-finals.

Fans who will actually be inside the stadiums watching the games unfold will navigate 10 different venues scattered across South Africa, most of which are conveniently located in the northeastern portion of the country. With 63 matches being played (64 if one counts the third-place match, which few watch), every pitch will see about six matches, with the larger venues like Durban and Johannesburg hosting the final matches.

For most of the 100,000-plus ticket holders, getting from stadium to stadium will not be an easy task. There is an extensive highway system in place with Johannesburg at its center, but the sheer size of the country doesn't make this a particularly attractive way to get around. A drive from Cape Town to Johannesburg takes about 15 hours. Luckily, most of the stadiums are located somewhat closer, grouped around the northeast. Trains are a more comfortable way for sports fans to get around. For those who want to travel in style, the famed Blue Train from Cape Town to Johannesburg has services and facilities comparable to most five-star hotels. Getting around within the host cities should also be simpler, as bus and trolley systems are currently being revamped to accommodate the expected increase in passengers.

But most of the people around the world will only be able to follow the games on television. According to FIFA, approximately one billion viewers tune in to watch the final alone, with similar, if lower figures for preliminary matches. It has been pointed out, however, that these figures are a bit exaggerated — by 70 million TV households, to be exact. According to Initiative Sports Futures, an independent sports broadcasting analyst based in England, about 260 million TVHH in 54 countries tuned in to the last World Cup final. Not a bad figure, but certainly not the figure FIFA boasted.

In the U.S. the situation is a bit complex. ABC will only air 10 matches on free-to air television, presumably the quarter-finals and beyond. On cable and satellite, however, ESPN and several of its spin-offs will offer more extensive coverage. And of course, Hispanic network giant Univision will air all the matches on free TV, but those American fans who don't fully understand Spanish and rely on free Anglo TV services could be understandably displeased, or as they say in Spanish: *no, nos gusta esta.*

Apparently, Anglo TV networks in the U.S. can afford to toss away a billion-dollar industry. Some people reason that there is no place to air commercials, causing American broadcasters to be disinterested. But of course, that's not a valid argument,

since some 30 years ago European, Asian and Latin American broadcasters had the same problem and managed to come up with a feasible solution. If U.S. Anglo broadcasters can't stop the game to flash the sponsors' logos in viewers' faces, why not place sponsors within the game electronically? This World Cup alone, 12 official partners/sponsors will see their logos displayed on banners beside the pitches, on streamers inside the stadiums, and (for additional sportswear providers) on the players' shirts themselves — a good pool for broadcasters to monetize.

Budweiser, Castrol, Continental, McDonalds, MTN and Saytam have reportedly spent $100 million each in their advertising partnerships with this World Cup. So it's not a money issue. Perhaps it's a creativity issue. A philosophical form of creative sports like football can't compete with American Football, where everyone takes commands from the quarterback, who has in turn been given instructions by the offensive coach.

It might also be a goal-scoring issue. Americans get bored if they don't see scoring. Last World Cup, every game averaged about 2.3 goals. Not exactly a shoot-out. But it doesn't take close examination to see that a goal is seldom the most exciting event in a match. A striker losing his marker in a display of footwork, a cross that curves at just the right moment, or a visionary through ball that makes one wonder just how many eyes these guys have, are all things that define what a beautiful game football really is. Instant gratification by high-scoring sports, as well as a society that praises speed and quantity over quality, points to some sort of cultural void in America, rather than an issue of advertising or boredom.

"Digital Dividend:" When the E.U. Gets It, What Will It Do With It?

Simon Murray of Informa Telecoms and Media

By Bob Jenkins

Analogue television transmissions in the European Union are scheduled to end by 2012. But, as is often the case with targets set by the E.U., some states will meet them and some will not. Here *VideoAge* takes a look at the progress being made towards an all digital continent and assesses who will make the date and who won't, as well as how the benefits will be deployed.

Currently, six members of the E.U. — The Netherlands, Luxembourg, Germany, Denmark, Sweden and Finland have already switched to digital terrestrial television (DTT). A further five — Spain, Estonia, Austria, Slovenia and Malta — will make the change over the course of 2010, while the 14 remaining members of the E.U. (with the exceptions of Ireland and Poland) are committed to make the switch by the agreed date of 2012. Poland has said it should be ready to turn off analogue in 2013, while Ireland has yet to set a date.

Spain originally adopted the 2012 date to which most European countries are adhering. However, at the end of 2004, the Spanish government decided it wanted to promote DTT in the country (an earlier attempt to launch DTT in the country had failed). As part of its planning, it moved the digital switch-over date forward to 2010. By the middle of February, more than 90 percent of Spanish households had access to digital in one form or another, and 83 percent were receiving DTT, whose market share was 57.5 percent, compared to analogue terrestrial's share of 20.2 percent.

At February's Digital Switchover Strategies 2010 conference organized in London by Informa, the British research and publishing group (it publishes *TBI*), Ignacio Leon, director of Communication at the Spanish Office for DTT switchover, announced that the final phase of switchover had begun and that Spain's analogue signal would be switched off by early this month.

In addition to the significant differences in dates at which various European Union countries are making the switch, there is a vibrant debate in regards to what to do with the spectrum freed up by the move to digital, the "digital dividend" as it has come to be called. At the Informa conference, Philippe Lefebvre, director general, Information Society and Media at the European Commission, pointed out that in three of the six countries that have already made the move (Denmark, Sweden and Finland), a significant part of their "digital dividend" had been used to open up new channels. But this did not by any means have to be the case. Lefebvre was at pains to point out, "The 'digital dividend' does not belong exclusively to broadcasting," although he did accept that "continuation of existing broadcasting licenses in a digital form was a prerequisite."

Other possible deployments of the "digital dividend" mooted by Lefebvre included "more economical supply of wireless broadband," which he suggested would have a significant economic benefit. He also suggested that whereas broadcasting was to benefit from some of the freed spectrum, it might well be in the form of "increased innovation in broadcasting services," in particular, the provision of HD services. However, both he and Simon Murray, principal analyst, Media at Informa Telecoms and Media, agreed that one of the least likely uses of the dividend was mobile TV, with Lefebvre describing DVB-H as "probably now history."

Whatever the newly available spectrum is put to, the economic benefits of the move will clearly be significant. Although stressing that the estimates he gave were personal estimates and not those of the European Commission (the executive branch of the E.U.), Lefebvre put the possible benefit to Europe's economy at anywhere between 17 billion euro and 75 billion euro (US$23 billion — $102 billion), depending on the exact nature of the new services chosen to be deployed and the resulting demand for them.

But of course there is no such thing as a free dividend, and David Scott, CEO of Digital UK, estimated that by the time the U.K.'s switchover was completed in 2012, the communications cost alone would be in the area of £150 million ($230 million).

Although there are still two years to go before the U.K. officially switches off the analogue signal, approximately 90 percent of U.K. homes already have access to digital, a fact which is in no small part attributable to Freeview, the country's free DTT service. Freeview, at 50 percent penetration of all households, represents more than half the total UK digital penetration.

Freeview was launched in 2005. It has reached the 50 percent penetration mark in just five years which, as managing director Ilse Howling pointed out, compares very favorably with the 15 years mobile phones took to reach 50 percent penetration and the 10 taken by color television. Furthermore, in those U.K. regions where the analogue signal has already been switched off, an average of 68 percent of analogue homes chose Freeview, as opposed to the 20 percent opting for Sky, and negligible numbers picking Virgin Media, the cable option. On that basis, Freeview's Howling predicted that by the time of the 2012 London Olympics, Freeview would be in over 90 percent of U.K. homes.

> *Although there are still two years to go before the U.K. officially switches off the analogue signal, approximately 90 percent of U.K. homes already have access to digital, a fact which is in no small part attributable to Freeview, the country's free DTT service.*

Also enjoying reportedly rapid growth is HD. Although there is of course no direct link between the "digital dividend" and the roll-out of HD, Danielle Nagler, head of HD at the BBC, was clear that in the minds of many people, the two are linked. As an illustration of the speed at which the new service is being adopted, she cited the BBC's first ever HD transmission of *Planet Earth* series in 2007 which registered an HD audience "that was too small to measure." By late 2009, when the BBC was showing the next Attenborough series, *Life*, 22 percent of the program's audience was watching in HD. The BBC has adopted the slogan, "our best, at its best" for its HD channel, clearly reflecting Nagler's view of the technology. "At its heart," she insisted, "it simply improves our relationship with our audience." Nagler believes that the fundamental point about HD is that "it is simply better television."

Of course there are many other possible uses for the "digital dividend" and the debate is ongoing in regard to which will eventually be deployed. There is the BBC's *Project Canvas*, which would provide an IPTV platform open to other content producers and owners, but this is strongly opposed in some quarters. Paul Bristow, vice-president of strategy at Swiss-based ADB Group made the case for "hybrid TV," which would allow a huge range of content and all of the Internet to be accessed via television sets.

Whatever each E.U. country finally decides to do with the spectrum freed by the move to digital, it seems certain that the overwhelming majority of its members will have made the move by the set date of 2012, and that, as ADB's Bristow observed, "the traditional notions of broadcasting have never been more threatened."


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France's New TV Powerhouse with Powerful Friends

Banijay CEO, Guillaume De Verges

The world first heard of Banijay and its founder Stéphane Courbit at MIP 2008. Prior to that, Courbit was a well-known figure only in the French TV industry as head of and shareholder in Endemol France.

Before Spain's Telefonica sold its control of the whole Endemol Group to Italy's Mediaset in 2007, Courbit's interest in Endemol France was bought out by Telefonica for a reported $600 million. According to some press accounts, there was some feuding between Courbit and Telefonica due to Courbit's large uncapped earn-out. Endemol France had been run as a separate entity and, reportedly, accounted for 25 percent of the entire Endemol Group's value.

Courbit is now further strengthening his grip on France's TV industry with the acquisition of 70 percent of France Télévisions Publicité (FTP), after French media group Lagardere dropped out of a hotly contested bidding war. FTP is the advertising arm of the state's France television group (which includes France 2, France 3, France 4 and France 5, plus a number of specialized channels), which last year reported revenues of 400 million euro (U.S.$582 million).

The idea for Banijay was born in 2007, when Courbit, along with French luxury goods magnate Bernard Arnault and Italy's De Agostini Group failed in their bid for the Endemol Group. But, according to the U.K.'s *Sunday Times*, Courbit still lacked some of the financing for Banijay Entertainment as late as March 2008, which indicated some start-up difficulties.

The 45 year-old Courbit entered the television business in 1990 and, in 1994 founded Arthur Stephane Production (ASP), which was acquired by Endemol in 1998. The company was first known as ASP Endemol and,

later Endemol France. Courbit served as its president.

Under his guidance, Endemol France signed a five-year $115 million contract with TF1, which stipulated that, if Courbit was to leave the company for any reasons before the contract's expiration, the deal would automatically be terminated.

Today, Courbit is involved in several businesses in the energy, entertainment and gaming sectors, all of which are controlled through his Financiere LOV, which has a 32.3 percent share in Banijay Entertainment. The remaining 67.7 percent is held by a group of investors, including French billionaire Bernard Arnault, Italy's De Agostini Group and the Agnelli Family, through its financial group EXOR. Each holds 17.2 percent of the company for an investment of $57 million each, and Paris-based AMS Industries, which holds the remaining 16.1 percent share.

According to French financial paper *Les Echos*, LOV invested $162 million into Banijay, while the other partners contributed $220 million.

Reportedly, Courbit's talent for making money is surpassed only by his ability to befriend top-level international executives and politicians. His friends are said to include John Elkann (head of the Agnelli family), Lorenzo Pellicioli (of De Agostini Group), Vincent Bolloré (of the Havas Communications Group) and French

Stéphane Courbit, founder of Banijay

president Nicolas Sarkozy, in addition to the aforementioned Arnault. One of Courbit's mentors, public relations guru, Anne Meaux — who began her career as press secretary for French president Valery Giscard d'Estaing — is now handling Banijay's and Financiere LOV's communications through her Paris-based agency Image Sept.

Banijay's original business plan reportedly called for expanding into 15 countries through acquisitions. Currently, Banijay operates in 10 countries, including Spain, Germany and the U.K., but some observers consider its plans to be too idealistic.

First, most of the territories into which it's expanding are small markets, with the exception of the U.K., where it will be difficult to do business, due to the strong presence of FremantleMedia and Endemol, both of which are headquartered in London. In terms of library material acquired, it certainly won't be providing a good cash return. In addition to France (its home base), Spain could represent a good market, if only through the De Agostini Group, which controls TV network Antena 3. But, it's doubtful that De Agostini would favor Banijay over its own TV group, Zodiak. It is similarly unlikely that the other Spanish TV networks, Telecinco and Cuatro, would favor Banijay over Endemol, which is part of the same group (see story on page 24).

In Spain, Banijay controls 51 percent of Cuarzo Producciones, which was acquired shortly after Banijay sold Spanish light entertainment company El Terrat back to its owners a scant three months after buying it, reportedly due to a difference of opinions regarding production strategies. Similarly, Banijay could have some difficulties in Italy due to Mediaset's control of Endemol.

(Continued on Page 30)


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Banijay View [Continued]

(Continued from Page 28)

In Germany, Banijay could have some success through its 50 percent ownership of Brainpool, a production company focused on light entertainment. But it could still be an uphill battle against FremantleMedia, which is owned by German powerhouse, Bertelsmann.

Traditionally, success in major TV territories comes from a direct link with the U.S., as has been the strategy of both FremantleMedia and Endemol. It is possible that for this reason, Banijay's CEO Guillaume de Verges recently spent some time in Los Angeles shopping for a company, first approaching Angel City Factory and recently, Bunim-Murray Productions, a more active production company, which were both acquired.

Banijay COO, François De Brugada

In addition, all territories into which Banijay is expanding through acquisition, are also under the interest of its partner, De Agostini. Reportedly, cash-rich De Agostini is looking to take over Banijay's operations, thus strengthening Banijay as well as De Agostini's own TV production interests, both of which are still perceived as two very weak TV operations.

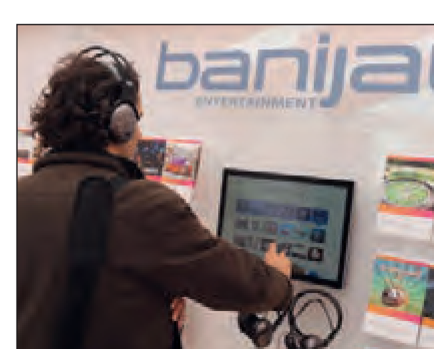
In addition to CEO de Verges, a former executive at TF1 and Canal Plus, Banijay's executive team consists of, CCO François de Brugada, a former TF1 and M6 executive and CFO Pascale Amiel, a onetime KPMG Audit executive. Last summer, Michel Hodara, formerly of America's Cup (sailing), left his co-CEO position to return to Switzerland where he co-founded Done SA, a sports marketing firm.

The international TV industry first made the acquaintance of Banijay when it opened up its impressive stand in the square by the Palais at MIP 2008. But the mystery of that large tent managed to spill over into the following MIPCOM, when a representative from its PR agency, Image Sept, came to *VideoAge*'s stand and left nothing but a business card on which the word "Banijay" was handwritten.

The PR firm has now assigned two of its own agents to serve the communications needs of Benijay and no information about the company can be gathered directly without going through Image Sept, a guarded firm, perhaps due to its nature as a political spin doctor.

For this story, *VideoAge* has been in touch with several of Image Sept's PR agents, who were able to provide the executive photos and information about the bid for FTP, but at press time were still not able to provide answers to several other questions.

The first set of questions posed to Banijay management through Image Sept, were of factual nature, seeking to verify data and figures reported in this story. The second set of questions concerned future plans and challenges for the company. If answers are ultimately forthcoming, *VideoAge* will report them in its Daily publications at MIP. Curiously, the word "banijay" is a modification of the Arabic word "bani gen" indicating a group of genies.



The Big Business of Film And TV Biz Associations

The American film and television industry is comprised of 3.5 million professionals including advertisers, lawyers actors, directors, producers, make up artists, writers, animators and set builders. The list goes on and on. The majority of this industry is made up of middle class workers who earn a living wage and contribute over $13 billion annually to federal and state taxes. They also contribute an estimated $500 million a year to various not-for profit trade associations: Professional societies which are distinct from labor unions.

The total number of national U.S. film and TV associations is difficult to ascertain. It has been estimated at over 80, and they span every aspect of the industry: Film, broadcast, cable, satellite, IPTV and advertising. In turn, each sector is subdivided into marketing, design, talent, news people and even women (such as AWRT now AWM) and environmental (EMA). Naturally, that number excludes regional trade associations, such as the Florida Motion Picture and TV Association, and national consumer electronic groups such as CEA.

Equally difficult is establishing total membership numbers, since many professionals belong to several associations simultaneously. An educated guest, considering redundancies, could place this number at one million members at the national level.

Even though guilds and unions are also associations, their main task is to protect and guide their membership in the workplace — rather than provide a social setting. Therefore, they are outside the realm of this article, as are the industry's lobbying associations such as MPAA (film and TV) and RIAA (music).

A few associations were born exclusively as film and TV trade shows, while others evolved into this aspect of the trade industry (which includes the staging of film and TV festivals).

Some of the more familiar associations that organize trade shows are NCTA for cable, NAB for hardware, NATPE for international television and IFTA for independent films.

Navigating through the myriad of television and motion picture associations requires a precise destination, a dictionary of acronyms and a specific trade. Annual dues start as low as $25 and go up to as much as $5,000, mostly to cover the cost of salaries, publications and special events.

The Emmy statuette

Academy Awards' Oscar

There are different levels of membership for corporations and individuals. Most associations offer a student level and premiere membership status. Some associations also offer medical insurance at a discount, such as the satellite TV association, SBCA.

Because many industry professionals tend to belong to several associations simultaneously, annual membership fees can run in the order of $1,000 or more. This is without counting costs for evening galas, award ceremony tickets, fund-raising events and advertising in various journals.

All of which begs the question: "Are they getting a bang for their buck?" The answer remains elusive.

Industry associations have been around since the 1920s and serve many purposes: to promote professionalism and creativity; provide opportunity and support; and protect industry standards, interests or copyrights.

Founded in 1927 and dedicated to the advancement of arts and sciences in film, the Academy of Motion Picture Arts and Sciences (AMPAS) has over 6,000 members. The Academy is best known for presenting the industry's highest honor, the Oscar, for excellence in filmmaking.

Membership to the Academy is by invitation of the Board of Governors, and the candidate must be sponsored by at least two members within the branch they wish to join. An Academy-aspiring member is automatically considered qualified for membership if nominated for an Award.

The Academy of Television Arts and Sciences, (ATAS), was created in 1946 in the earliest days of television. Together with its sister organization, the National Academy of Arts and Sciences (NATAS), it has 20 chapters around the country, totaling 15,000 members. Best known for presenting the Emmy Awards, they're dedicated to the advancement of arts and sciences in the television industry through the recognition of excellence.

Besides voting on the Emmy Awards, ATAS members network and participate in seminars, mixers and a variety of special events and have the added benefit of being eligible for medical insurance.

The Hollywood Radio and Television Society (HRTS) was chartered in 1947 and is an organization of West Coast Executives from all fields, including the brightest professionals from the broadcast and cable networks, studios, talent and advertisers.

Kevin Beggs, president of HRTS and Lionsgate, commented on the value of being in the organization, saying, "Everyone who is not in it, who is working their way up the career ladder — wants to get in it. They want to be in this room rubbing shoulders with decision makers and the networks and the studios." He continued: "Membership is at an all time high, higher than we've ever been."

PromaxBDA, established in 1956, is a non-profit and membership driven association with over 3,000 member companies. Jonathan Block-Verk, President & CEO, explained, "Too often, industry associations and trade groups are legacy-lead, designed to help their members maintain a status quo and relish in the business models and practices of yesteryear. As an association, I believe it's our fundamental responsibility to help our members identify emerging monetization trends in the entertainment business, and then drive the industry in that direction."

The National Association of Television and Program Executives is an association dedicated to developing and distributing television programming across all media platforms and providing marketing and meeting opportunities. NATPE membership has grown substantially since the original 71 members first met in 1964. It now numbers over 1,500. NATPE sponsors an annual conference with three days of workshops, exhibits, keynote addresses and awards attracting everyone who is anyone in the industry.

The Television Publicity Executives Committee (TPEC) was established in 1985 and is made up of West Coast executives for broadcast and cable networks and production and public relations companies involved with primetime television. The original membership of 11 swelled to 75 in 2010. The requirement that members be top executives was lifted recently and this, combined with the increasing number of cable channels, has allowed for substantial membership growth.

Even though TPEC and HRTS tend to be limited territorially, their members are often bi-coastal, thus meriting designation as national organizations.

At times, various associations team up for greater causes and impact, like last March when women's committees from Hollywood unions, guilds and association members — including AFTRA, SAG, WGWA, WIF and PGA — gathered together in celebration of International Women's Day, raising awareness for the Afghan Women's Writing Project.

All figures reported in this story were checked with the Maryland-based *Association Trends* magazine, published by Columbia Books, which helped in fine-tuning the estimates. ●

(Valerie Milano from Los Angeles and Dom Serafini from New York contributed to this story)

STUDIOS

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An Analysis

Spain and Italy Team Up For TV of the Future

All companies have lofty goals and strategies with which they hope to achieve them. In most countries such strategies often require that a firm borrow large sums of money to generate more revenue, or that it use its cash-flow to expand via acquisitions or by leveraging buyouts. In Italy, where money is never a problem because the State guarantees financing, strategies are more complex, requiring political skills and the occasional assist from friendly countries, like Spain.

The symbiosis created between Italy and Spain — notably between Italy's Mediaset and Spain's Telefonica, plus Spain's Antena 3, which is owned by Grupo Planeta-De Agostini (which in turn is controlled by Italy's De Agostini), are cases in point, but for contrasting reasons.

To understand why relationships and political skills trump money in Italy, it is helpful to recall the separate attempts made by American, Mexican and French companies to purchase Telecom Italia and Alitalia.

In attempting to take over Italy's telephone company, Telecom Italia, American AT&T teamed up with Mexican billionaire Carlos Slim (the world's third-richest person) and went to Rome in 2007 with over $6 billion seeking 18 percent of Telecom Italia. At the unfamiliar sight of all that cash on the table, the Italians basically started laughing.

Ultimately, Telecom Italia was assigned by the government to a group of Italian banks and to the politically friendly Telefonica, which, in order to gain indirect control of the company, invested just $3.14 billion into Telco, a holding company that currently owns 22.4 percent of Telecom Italia. Telefonica and Telecom Italia also have a working relationship in Germany to provide triple-play (TV, data and phone) services.

In the past, the owner of Telecom Italia controlled less than one percent of the company's shares. Before Telefonica's involvement, control of Telecom Italia had been in the hands of a group that held just 0.3 percent of the shares. The control of sensitive Italian companies often goes to groups that are well connected politically and that don't invest any of their own money. Instead, with the support of the government, they take out bank loans to acquire control through a scheme called "Chinese boxes" (the equivalent of Russian Matryoshka dolls). In Italy, it's possible to use this system to control a company indirectly, while owning very few direct shares.

Apparently, this Italian "business model" was not taken into account by the French, when AirFrance was looking to buy Alitalia in 2008, coming in with a cash offer of $1.7 billion. The French were essentially ridiculed for using money as a bargaining tool. Eventually, the Italian airline was assigned by the government to a politically influential Italian group that took out a $580 million loan to buy it.

In Italy, just using cash to buy politically sensitive companies is counterproductive, especially if the potential buyers want to use their own money, and is therefore outside of any government control. And this *modus operandi* extends to media as well. When an entrepreneur without strong political connections was looking to buy shares of influential Italian daily *Il Corriere della Sera* on the open market with cash, he was arrested on some made-up charges before he could attain more than the 14 percent stake he had already managed to acquire.

Now, we move on to a more TV

(Continued on Page 36)

Spain: Land of Opportunity

By Giovanni Verlini

As the days of Spain's economic expansion have been replaced by a time marked by deep economic recession, the country's broadcasting sector has quickly become a hunting ground for international media groups looking to expand their reach.

During 2009, which has been widely described as advertising's worst year in living memory, the country's TV advertising spend shrank by 23.2 percent year-on-year, to a total of 2.368 billion euro. The two leading free-to-air commercial broadcasters Telecinco and Antena 3 took a combined 51.8 per cent (26.4 per cent for the former, 25.4 per cent for the latter). The other four broadcasters were left with the remaining 48.2 per cent, with state broadcaster TVE commanding a 18.4 per cent of the total, and the other TV networks — Cuatro, Forta and La Sexta — each getting between 11 and nine percent of the ad pie.

A TV market shrinking at this pace, however, cannot sustain so many independent operators, and since desperate times call for desperate measures, the Spanish government moved quickly to do all it could to revive the broadcasting sector. In February 2009 the government made the decision to lift a ban on cross-ownership among broadcasting sales reps and announced a plan to reduce advertising on state-funded TV channels.

These decisions were taken as a measure of support to commercial broadcasters in a dwindling market, in the hope that they would consolidate to take advantage of economies of scale. This year, the sector is starting to see the first results, though it is foreign investors that were already present in the Spanish marketplace that are taking advantage of the relaxation of antitrust legislation — perhaps an intended consequence of the government's decision. Italian groups such as Mediaset and De Agostini, have been among the first to spot the opportunity and move in.

Despite the country's recent economic woes, Spain remains Europe's fifth largest economy and represents an invaluable strategic market. For a group like Mediaset, whose controlled Telecinco is on course to take over Cuatro by the third quarter of the year, Spain could become a perfect springboard for expanding into the world's vast Spanish speaking markets. Indeed Mediaset-Telecinco has already made its first move in this direction.

In February 2008, Telecinco completed the acquisition of a 35.08 percent stake in Pegaso Television, which has an 83.34 per cent controlling interest in Caribevision TV Network, a newly established TV channel that broadcasts to the Hispanic communities in New York, Miami and Puerto Rico. Telecinco contributes its know-how in content, advertising and management. The stated aim of Caribevision TV Network is to cover the entire East Coast of the U.S., home to what is one of the wealthiest markets in the world for Spanish-language programs.

Mediaset is not the only group trying to expand its presence in the world's Spanish market. The Italian media group De Agostini, which controls Spain's commercial broadcaster Antena 3, has been trying to take over La Sexta and create a rival group to the Telecinco-Cuatro behemoth. At press time, however, the deal is reported to have fallen through. It is not clear as yet what could happen to La Sexta, though it seems unlikely that with just an 8.6 percent TV ad market share, the broadcaster will be able to remain independent for long. Among La Sexta's shareholders is Mexico's Televisa, which retains a 40 percent share in the broadcaster.

Even more difficult to predict is what the future holds for Forta, the Federation of Regional Organizations of Radio and Television. The network, which groups the broadcasters from the country's 12 autonomous regions, currently enjoys a 10.3 percent TV ad market share. Much of what happens to it will depend on the political and economic future of the regions. If it will still be able to afford to operate independently depends on whether the recession turns out to be a prolonged one or not.

(Continued from Page 34)

industry-related development. In Spain, Telefonica owns 21 percent of Digital Plus, the pay-TV platform developed by Spain's Prisa. Prisa recently sold its other TV network, Cuatro (created in 2005 from the ashes of Canal Plus), and 22 percent of Digital Plus to Mediaset's Telecinco.

Like other over-the-air broadcast service around the world, Mediaset knows that it has only 10 more years; after that, broadcast will be replaced by broadband, which Telecom Italia is offering. For that reason, with one eye looking at its future and the other eyeing its strategy, Mediaset has in the past tested the waters for a possible acquisition of Telecom Italia, sacrificing (i.e., selling) its broadcast entity in the process. Mediaset's interest in Telecom Italia is widely known, both in Italy and in Spain. Italian media newsletter *Key4Biz* has stated, "The true interest of [Italy's prime minister Silvio Berlusconi] concerns the possible entry of Mediaset in Telecom Italia." Berlusconi is also Mediaset's key shareholder. Spain's *elEconomista* has even reported that "Mediaset could enter into Telco [Telecom Italia's key shareholder] through Telefonica."

The general reaction to Mediaset's desire to buy Telecom Italia wasn't pretty, but the need to own some sort of "dumb pipe" still remains. To realize this need it is sufficient to look into the Comcast-NBC and Shaw-CanWest deals (see front cover stories).

For Berlusconi the only solution for Mediaset's needs, was to let Telefonica (with which has a good relationship) enter into Telecom Italia's control. In 2007, Telefonica sold its control of Endemol to Mediaset and, recently, the center-right Berlusconi government entered into talks with Telecom Italia about it being taken over by Telefonica, calling it "an inevitable merger," since the Spanish group has the first option to buy out its fellow shareholders, who could be willing to get out of Telecom Italia's $49 billion debt.

However, it is possible that Intesa (one of the three Italian financial groups that, together with Telefonica, own 24.5 percent of Telecom Italia through their holding company, Telco) and Unicredit (the bank that has a stake in Generali, the other Telco shareholder) are aware of this plan and, as representatives of the political left, are for now derailing the whole deal. Coincidentally, the TV interests of the Italian political left in Spain are held by the De Agostini group, which controls Antena 3. Recently, De Agostini unsuccessfully tried to acquire Spain TV network La Sexta, expecting to create Antena-Sexta, a formidable group the company hoped would be more effectively competing with Mediaset's SuperCinco (Telecinco and Cuatro).

The left's strategy for the future of communications in Italy is basically the one developed years ago by former prime minister, Romano Prodi, a onetime president of the holding company that owned Telecom Italia prior to its "privatization." Prodi always resisted Berlusconi's involvement in Telecom Italia, but, aware of the telephone company's inevitable role as Italy's main distribution "pipe," he advised splitting Telecom Italia into three branches: the fixed lines, the last mile and the service company.

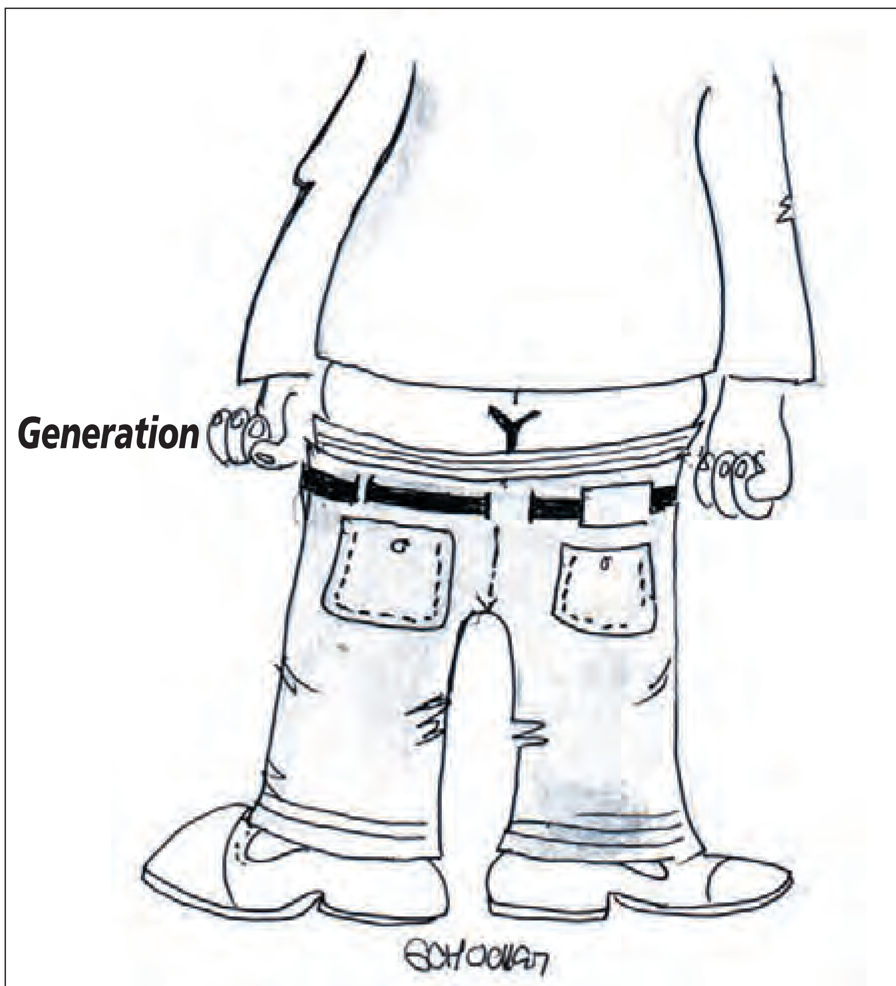
In order for Telefonica to fully take over one aspect of the Italian telephone company, Telecom Italia has to be split at least in two: The infrastructures and the service provider, with the latter going to the Spanish group and the former remaining under Italian government control. Mediaset only needs the infrastructure (after all, IPTV allows for triple-play: TV, data and telephony), which, once separated from the service business, will be much easier to acquire.

A similar strategy will work well for Telefonica in Spain as well, having Mediaset as a partner, considering that Mediaset controls content in Italy and in Spain. When television around the world will inevitably phase out its over-the-air operations to move into broadband and use the terrestrial frequencies for the Wi-Fi broadband service, Mediaset will be ready.

Learning How To Talk In The Digital Age

Browse any of today's TV market seminars' brochures and you'll need to run to the dictionary. Never before has industry speak been so convoluted. The thing is, you probably won't even be able to find lot of these suspect words in the dictionary. They're too new, too outrageous, heavy on slang or plain don't make sense.

So, let's come to terms with of some of the nonsensical new language and have fun in the process.



A la carte: A way to milk customers.

B2B: Hamlet, version 2.0.

B2C: A way to see money with binoculars.

Brand value: Future earnings.

Brainstorming: A group of people hiding from management.

Brand extension: Make the best with what one's got.

Bits: Rhythm (or beat) in a digital form.

Byte: The programming portion of a TV station's budget.

Buzzword: Words said to people to buzz off.

Cache: Money spent on the same things.

Cannibalizing: Vertical integration.

Cash Cow: TV execs in Cannes during MIP.

CCTV: Closed Circuit TV (as in China Central TV).

Clickable: A good-looking person.

Competition: Something that happened before deregulation.

Consume (as in television): Turn it on.

Cool: Something hot.

Deja-moo: Rubbish.

Dot channel: The unused portion of digital TV channels.

Docudrama: A dramatic documentary.

Dramedy: A dramatic comedy.

Digital: Two bits of information (a.k.a. "My 2¢").

Download: Film, TV and music going to pot.

EBITDA: Short on cash.

Experience (as in online): Watching TV on a PC after eight-hours of work on that very same PC.

Experience (as in digital): Being burned with digital sales.

Economy of scale: A way to spend two bucks to save a buck.

Encoding: Paying to get some attention.

Firewall: Separation.

Flag: Indicator.

Floppy Disk: A prehistoric form of digital distribution.

Fiction: Eurospeak for drama.

Freemium: Limited free access and charge for special features.

FTA: Free to air.

Globalization: New term for monopoly and cartel.

Guerilla marketing: Religious fanatics going door-to-door.

Interactive: Chasing after the credit card you loaned to your kids.

Integrate: Preparing an alphabet soup.

IPTV: Television with great (or ipso facto) potential.

iPod: Trumped-shaped flowers (or ipomoea).

Junk food: TV ad revenues.

Matrix: Overlapping structures.

MBA: Master of Bankruptcy Administration.

Merger: An artificial way to get financing from Wall Street.

Mockumentary: Farce or false documentary.

Monetize: Taking money from the ATM machine.

Mobile content: Unhappiness with regular TV experience.

Mobile viewing: Passing time when there are no more text messages.

Memory stick: Forgetting what the TV biz is all about.

Navigation: Getting lost in cyberspace.

Net neutrality: Gays in the military.

Narrowcasting: Reaching a niche target as wide as possible.

Ownage: Successfully hacking someone's computer.

Outsourcing: Passing the buck around.

Pwnage: Game speak for ownage, where a winner owns the game.

People meter: Short people (about 3 feet or one meter).

Pixel: The smallest part of an image.

Platform: The plank to dive from into the sharks.

Pod: A slang term for skipping TV commercials.

Q of S: Quality of service (like in a restaurant).

Revenue stream: Anything that comes in unexpectedly.

Reality show: A well planned program.

Risk reduction: The elimination of a layer of management.

Rich media: An expensive medium that is not well done.

ROI: A new bully on the block.

Sport: U.S. speak for games.

Show runner: Once, an executive producer.

Snail mail: Prehistoric way to send a get-well card.

Software: Upgrades that human brains need to be compatible with computers.

Smartcard: Notes left by spouses.

Solution: When companies don't know what to do.

Social networking: Avoiding human contact.

Tweens: Aged between 10 and 12 years; who don't need user's manuals.

Tweets: The sound of a thought.

Touchscreen: Massaging a TV set.

U.S. football: Hand-held game.

Unique visitors: There by mistake.

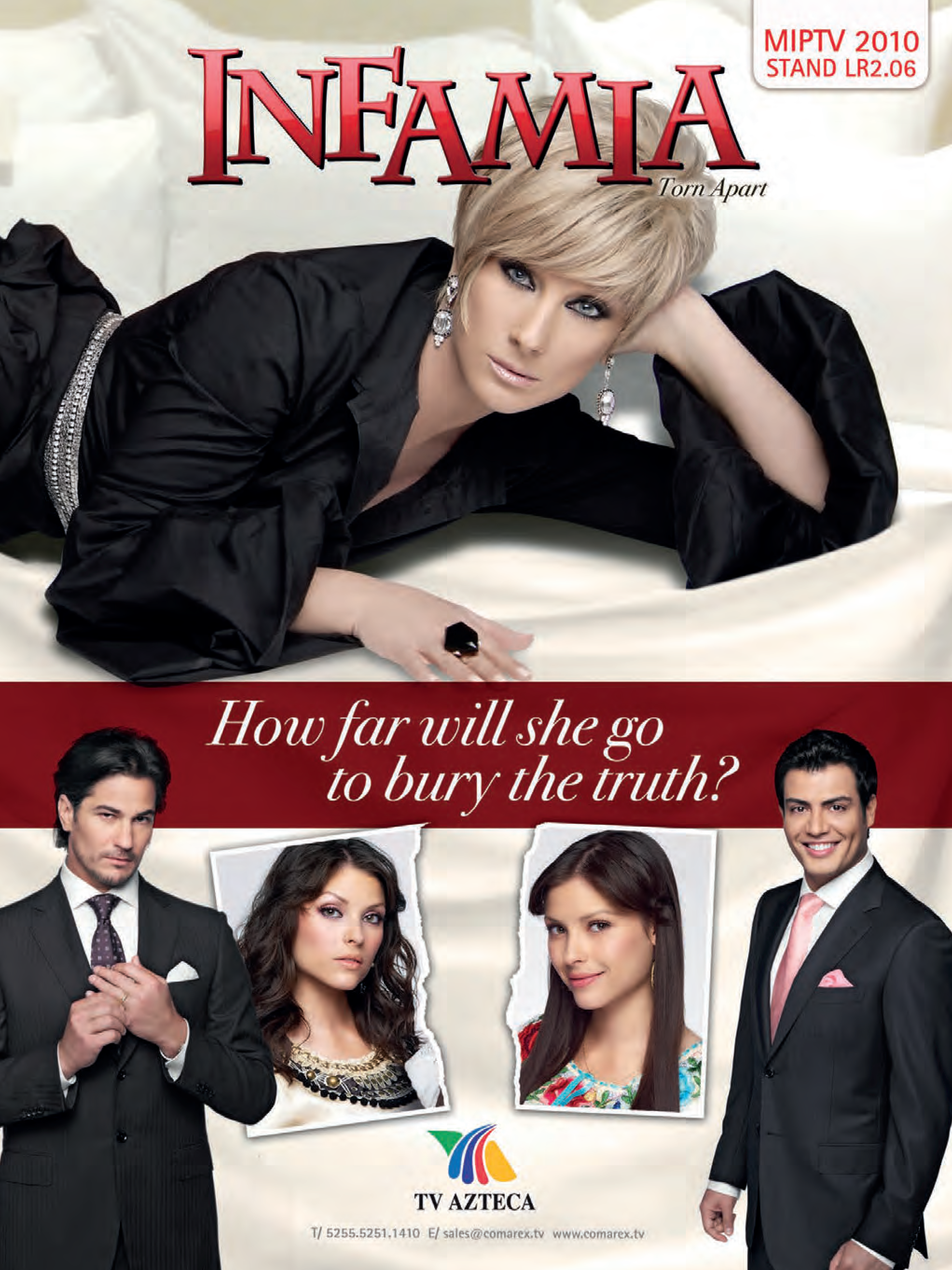
Upload: Getting something off your chest.

Vertical integration: Selling to oneself.

Viral marketing: Reaching consumers when they've been weakened by the flu.

Walled garden: Restricting access.

Wi-Fi; Hi-Fi; High Five: High quality.



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A Tough 2009 Reviewed Through The Pages of *VideoAge*

If we've said it once, we've said it tens of times: 2009 was a tough year for the international TV 'biz. It's no surprise, then, that the pages of last year's *VideoAge* monthlies and market dailies were dominated by the economic struggle rocking the industry worldwide. But financial worry wasn't the only topic to make headlines. New media and the rise of Africa, the Middle East and Asia also garnered attention. *VideoAge* took a look back through its 2009 archives to find out what issues made news, what conclusions can be gathered about one of the most difficult years on record, and what all those articles were really about.

VideoAge's coverage of the economic downturn began in its October 14, 2008 MIPCOM Daily. Headlines such as *Wall Street Catches Cold, Will TV Biz Get Pneumonia?* warned of the impending crash. But *VideoAge*'s hard coverage of the recession began in 2009's January issue, in which it was clear that executives faced an uphill battle. The customary NATPE articles were colored by ominous predictions of budget cuts. In the cover story, *NATPE Buyers Buoyant About 'Biz But Bearish*, acquisitions execs were uncharacteristically — but understandably — cautious about their buying strategies. Inside the magazine, another story, titled *Shaky Economy, Floor Plans, Latins Drive TV Market*, featured executives talking about every market topic under the sun — but the plummeting economy seemed to be foremost in people's minds.

The NATPE dailies likewise reflected apprehension on the part of market attendees. *VideoAge* Daily tackled the numerous challenges for the convention on Day One. Besides the bleak financial outlook, there were dwindling attendance figures and the possibility of a Screen Actors Guild strike to consider. Also on people's minds was the suite vs. convention format question, which was resolved at NATPE 2010 by all-but-abolishing the convention floor.

However, *VideoAge* also encouraged caution in predicting economic doomsday, by pointing out all the ups and downs since 1981. In a January article, it reviewed all the past dramatic economic crises, including the tech stock bubble, the Gulf War and the 2001 recession, to highlight the possibility that the latest downturn could just as easily wither away.

Spring's Issue continued to bring discussions of the recession. In March cover story *Laughter Is Back Big To Console Audiences*: execs confirmed that, "Feel-good television [was] definitely in demand," and producers and broadcasters from around the world described an outpouring of comedic content on every possible topic (except investment bankers).

When the MIP-TV dailies rolled around, *VideoAge* observed that business at the pivotal market remained lively, although it lacked some of the swanky parties of past years. In Day One article *The Frills Are Gone, MIP-TV Thrills Remain*, Laurine Garaude of event organizer Reed MIDEM stated that, "The economic downturn impacts everyone, so naturally MIP-TV [was] affected." Nevertheless, international professionals seemed to recognize that attendance at MIP was as mandatory (and cost effective) as ever, so participation numbers did not suffer too drastically.

But economy-wise, 2009 wasn't all bad. Despite a widespread dismal outlook for the state of cash flow, *VideoAge* reported in its May L.A. Screenings issue that the number of pilots produced for TV in the U.S. had actually increased to 80, up from 54 in 2008.

The rest of the year continued in a similar economic vein. June and October Issues echoed the cautious approach to MIP-TV. However, at MIPCOM, for the first time all year, market predictions were tinged with hope of economic renewal, and the article *Market Upbeat For Those With Exciting Content* revealed a new-found optimism from many companies.

Also central at MIPCOM was the trade show's official theme "Rethink" — which was quickly dubbed by *VideoAge* Daily, *You think You Know, But you Have No Idea*. The theme was originnaly used by the Advertising Research Foundation's March 2009 conference in New York City and, subsequently, re-used by the Davos Forum in Switzerland and other publications, such as Canada's *Financial Post*.

In the MIPCOM Daily, *My Two Cents* decried the lack of new TV leaders in the mold of the historic figures such as David Sarnoff, Bill Paley and Leonard Goldenson, which drew the ire of *VideoAge* contributor and former " top film and TV peddler" Norman Horowitz who blasted the offending article in the pages of website Huffingtonpost.com. However, on January 17, 2010, *The New York Times* used the same argument to report on the woes of broadcasting television.

Finally, in its December Issue, *VideoAge* closed 2009 anticipating troubles at NATPE 2010. The first hint of such problems was reported in the October interview with Disney's Global boss, Ben Pyne. The December Issue also reported on a growing Latin American TV market (which was estimated at $1.5 billion a year).

Overall, *VideoAge* 2009 was earmarked by financial articles, covering 20 percent of all its front cover stories, touching related topics such as *The Mystery of AGICOA*, Mediaset's take over of Endemol (both in April) and the explanation of the "Ultimates" (October). Plus, it anticipated the financial problems in Greece (June) and a surprisingly buoyant market in Asia (December).

In addition to the proliferation of articles dealing with the recession, a handful of other trends asserted themselves on *VideoAge*'s pages in 2009. Aside from the economy, issues surrounding the Internet and new media were prevalent. In January cover story *Net Neutrality: MPAA vs. IFTA*, we heard from both sides of the (very complicated) debate on government regulation of the Internet. Jean Prewitt, CEO of the Independent Film and TV Alliance (IFTA) weighed in on why her organization thinks legal content should not be subject to discrimination, and Dan Glickman, the MPAA's CEO at the time, countered with points about piracy and protection for content-makers.

New media was a hot topic at NATPE '09, particularly for the Latins, who were a-buzz about mobile platforms, as in the daily article *New, Improved Mousetraps Need Mastering*.

As industry professionals around the globe continued to fret over the Internet, its tendency to erode their cash flow and their inability to crack the code to harnessing it towards major profits, *VideoAge* continued to cover it. In March it examined *Analog Dollars Vs. Digital Pennies*, and discovered that "what [had] been lacking [were] programming and advertising formats that reflected the new medium." At MIP-TV, IPTV grabbed a cover story, as did monetizing the Internet. Story *Digital Holy Grail Is Here, Again*, reported on MIP's day three "Television Everywhere" panel, whose participants assured attendees that mobile media were on the verge of a breakthrough.

Fall brought even more variations on the Internet theme, with Canada's media guru Charles Zamaria declaring the Internet a destination ("It ain't television"), and an account of how cable and satellite providers are preparing for IPTV. Editor Dom Serafini even tackled the digital juggernaut in October's *My Two Cents* editorial, concluding that the transition to DTV could be the savior of struggling broadcasters if the industry would finally program their extra channels.

Always eager to conquer the next frontier, execs were also focused on emerging territories. In 2009, the hotspots (both figuratively and literally) were Africa and the Middle East. Africa's first content market debuted in February in Dakar, Senegal, and the event was such a success that a second market was added later in the year. *VideoAge* analyzed the new market and potential for the entertainment biz in Africa in a slew of articles that captured the hope that companies around the world have for the fledgling region.

VideoAge also forecast the rise of the Middle East as a booming television Mecca. As early as January 2009, *VideoAge* was spotlighting Israel and its neighboring territories, and December's *My Two Cents* profiled the leadership role of Qatar. The coverage appears particularly prescient in light of the announcement in early February that a DISCOP Middle East content market will premiere in 2011.

Of course, *VideoAge* took a break from the economy, the Internet and emerging territories to take on a slew of other topics. Big in 2009 were also articles about programming, as well as sports and TV advertising. Plus, *VideoAge* was selected as the official publication for Australia's WIN 30th anniversary celebration. **ES**

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CC Creating GK's TV From Scratch With Cash

Craig Cegielski, GK-TV president

Craig Cegielski never rushes into anything. The former evp of Lionsgate, now presiding over the creation of GK Films' TV division, likes to ponder every option, every question and every move. Take this feature, for example. It took three weeks to get his answers to our queries, but they were ultimately sharp and to the point.

Upon taking the new position, where he reports directly to Graham King, president and CEO of GK Films, Cegielski was quoted as saying: "We're not looking to make TV shows on a whim. We'll maximize our efforts by targeting specific broadcasters early in the process." GK-TV plans to develop, produce and distribute television programming worldwide.

For Cegielski, who moved only a few blocks west of his old Lionsgate office in Santa Monica, the new job represented an opportunity to work with a company that doesn't depend on outside financing for producing its movies and, at the same time, has an astonishing yearly output of A-titles. Currently, GK Films has 19 movies in development, an additional five films due to be released this year, and four more for 2011.

Graham King, 49, is a British-born producer and financier who moved to Hollywood from London in 1982. Soon after arriving in the U.S. he joined the international distribution department at 20th Century Fox under Bill Saunders. In 1987 he moved to Cori Films and, in 1995, founded Initial Entertainment Group (in which Splendid Medien had a 49 percent stake), before starting GK Films in 2007. Almost from the beginning he has worked with directors such as Michael Mann and Martin Scorsese, and with A-list stars like Leonardo DiCaprio, Johnny Depp and Nicole Kidman. He's been credited as a producer since 2004, and executive producer and co-producer since 2000. At the 2007 Academy Awards, King won a Best Picture Oscar as the producer of *The Departed*.

King called the expansion into TV "the next logical step" for his company, which has become a major player in the film business with a savvy approach to financing and foreign pre-sales. Cegielski commented that GK-TV will follow the model that has worked for King on the film side, partnering with top creatives who bring a strong vision to a project. The division will focus on programming with strong international appeal. The U.S. networks are starting to open up to airing series produced outside the U.S.

Cegielski worked at Lionsgate for nearly five years. Before that he spent six years working in production and development for Paramount International Television and working on format sales and production for the studios' CBS/King World International division.

Upon paying a few visits to Cegielski in his new offices, *VideoAge* had an opportunity to fire several questions at him in order to better understand his strategy.

VideoAge International: *GK Films has one of the greatest film outputs in Hollywood. Why is the company not well-known?*

Craig Cegielski: Oftentimes independent filmmakers partner with major studios to handle the complex domestic and international theatrical campaign, and therefore the one-to-one association between the creative force behind the film's origins and the film distributor can be diluted. Graham King formed GK Films in May of 2007 as a way to divest himself from his prior company and to ensure his brand was something he had absolute control over. You're right to point out that he has one of the greatest film outputs in Hollywood, and his appetite to expand this reputation into television couldn't come at a better time.

Graham King, GK Films president and CEO

VAI: *You have been tasked with creating a new TV division for GK Films, GK-TV. What are your production and distribution plans?*

CC: In creating the television unit, GK Films has cemented its place as an alternative studio. We get the best from our theatrical group which continues to produce amazing films with such creative partners like [Martin] Scorsese, [Johnny] Depp, [Leonardo] DiCaprio and [Mel] Gibson; producing films like The Tourist, The Rum Diary, Edge of Darkness and The Invention of Hugo Cabret. Applying this level of quality to television is a significant part of our business plan. While it's true we're invested in breaking new talent, we're committed to offering a home to A-level talent looking to exercise their creative muscle.

We're remaining a hands-on production studio and will be an advocate for our creative partners. Our mission is to offer a one-stop shop to showrunners as they look to explore their creative independence with a partner that can provide the infrastructure, financing and distribution to fully realize their work.

An area of expertise that is also proven is our ability to connect with the international community and place quality programming with the right international broadcaster. This company's origins start in international distribution, and it makes perfect sense to us that this track record will continue. We're open to international co-production, pre-sales and traditional program sales. The goal will always be to maximize the revenue potential of every title we're affiliated with, while ensuring that the title is placed with the appropriate network where it will thrive. Our job won't be done until we have the series sold, on the air, and properly promoted.

VAI: *How are you going to finance that kind of expansion?*

CC: We continue to be a well-capitalized company, able to take on numerous films and television series through independent financing. You can say Graham has bet on himself and it's certainly paid off.

VAI: *How big is your MIP-TV presence going to be? What product are you taking?*

CC: This is going to be a "walk, don't run" market for us. We announced the formation of the television unit in November and have spent the better part of the early year setting up productions. Needless to say, this market will be a bit of a balance between corporate messaging and discussions directly regarding our productions. We can service a myriad of opportunities and will be providing the international marketplace with another premium content supplier — which in these economic times is quite unique. To begin, we're proud to have announced the 10-episode series *Camelot*. The combination of an Academy Award-winning producer in Graham King, coupled with the Emmy award-winning talent of the production team of *The Tudors*, makes for an exciting opportunity to reinvest in this universal legend and bring it to Starz [network]. We're incredibly excited and believe it delivers on our initial promise to produce programs in the U.S. that have an international perspective and appeal.

VAI: *Are you preparing for the L.A. Screenings? What new product will you be screening?*

CC: L.A. Screenings will provide an excellent opportunity for GK-TV to connect with the buyers who are looking to secure premium primetime series for their programming schedule. *Camelot*, as I mentioned before, will be moving forward in Ireland and therefore we hope to have elements of the series to showcase for the buyers. The point of L.A. Screenings will be to carry the momentum with which we've started this venture, and to bring the buyers closer to the process as we develop and announce future series. The GK-TV model has been designed to blend powerful creative with transparent business, all while being an accessible partner to our international buyers. We have incredibly high expectations and we aim to deliver this year in Los Angeles and beyond.

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Indian TV

(Continued from Cover)

channels for some one billion viewers. This rapid growth has expanded beyond the general entertainment channels into news and other niche segments such as lifestyle, kids, and infotainment. And it is not expected to slow down anytime soon.

From 2009 to 2013, the Indian TV industry is projected to grow at a compounded annual rate of 14.5 percent. Several factors are expected to continue driving this growth:

- Digital distribution is expected to increase subscription revenues.
- The DTH subscriber base is likely to grow to nearly 28 million by 2013 (from 10 million in 2008).
- The entry of new players will increase competition and keep production costs low.
- IPTV penetration is expected to increase as broadband infrastructure is solidified.
- Focus will continue on unique regional content to satisfy audience's unique interests.

With such an exciting growth story as the Indian TV industry is experiencing, wouldn't the international TV industry expect to see India's major network buyers rushing out to gobble up content at events like MIP-TV? The simple answer — yes and no.

Let's begin with the "no" answer:

Dilshad Master, a 20-year veteran of the Indian broadcasting industry, who has served as senior vice president for National Geographic Channel, India, as well as COO for UTV Entertainment, explained that "India has a thriving television production business and these production houses churn out content that is topical, culturally relevant, and in a language that is still understood by the masses. While production houses may be in the mass production business, they indeed have a grip on their target audience," she said.

"Hollywood titles struggle for shelf space and only the really rare ones break through the clutter — *Avatar* being a recent example [of a movie that could fare well on Indian television]," Master commented. "The cultural and social nuances of Hollywood cinema are so totally alien to Indian culture that acceptance is limited to titles that are high on action or graphic content and larger than life e.g., *Rambo*, *Godzilla*, and the *Jurassic Park* series."

But problems are not just limited to the content area. In spite of the expected growth, technical challenges need to be resolved before Indian executives pull out their check books to buy programs.

Viren Popli is the head of TV and Digital Initiatives for Mumbai Mantra Media, the entertainment arm of the Indian conglomerate Mahindra and Mahindra. Before being tapped to lead Mahindra's foray into television, Popli served as senior vice president of the mobile entertainment division at StarTV. He explained that although new channels are being established at a fast pace, a majority of India's viewers are based in rural areas, and consequently are unable to watch their content. These viewers face a big challenge: they have access to analog platforms that carry between 80 and 110 channels but, in many cases, households have television sets with only 16 channels. Therefore, "most channels pay to be carried instead of earning distribution revenues," Popli said. Fees for a piece of "prime band" real estate on the first 16 channels range from U.S.$200,000 to $2 million a year. Even the more modern DTH delivery systems are beginning to charge carriage fees as their airwaves become crowded in urban markets.

So, while the growth outlook is optimistic, there are some fundamental problems, such as infrastructure that must be sorted out in order to fully expand content supply.

And, now, to the "yes" answer:

Nonetheless, Viren Popli acknowledged that TV stations "buy [content] directly, all rights in perpetuity," because there is little incentive to produce original content, and TV channels are more often than not reduced to becoming outsourced service providers.

For international producers looking to break into the market, Master suggests paying close attention to language. She saw how National Geographic Channel's market share tripled within three months of introducing a 24-7 Hindi feed, the country's most widely-spoken language. "There's a plethora of Hindi language general entertainment channels to choose from, and viewers don't really feel the need to watch dubbed content," Master added.

In contrast, when the popular Sahara One Network launched Firangi in 2008, the channel broadcast international drama and comedy series dubbed in Hindi. Although great effort was made to create seamless dubbing for shows like Telemundo's Spanish-language telenovela *El Cuerpo del Deseo*, known as *Second Chance* in India, the channel's popularity quickly fizzled. "[Only] the

> *Although new channels are being established at a fast pace, a majority of India's viewers are based in rural areas, and consequently are unable to watch their content.*

infotainment genre lends itself easily to language versioning primarily because it's the visuals that dominate the content," she explained.

In spite of this, many channels are branching out as affluent audiences develop a desire for unique options. In many instances, this has resulted in content being presented in its original form (or something very similar).

In 2008, UTV debuted its World Movies channel, which has been responsible for bringing films like *Amelie*, *The Godfather* and *The Counterfeiters* to such audiences. Other networks like NDTV, have followed suit.

It is also been noted that, formats taken from other countries have fared quite well in India. From standard sitcoms to emerging genres, success stories are prevalent. In the past five years the share of gameshows, reality, and talent (as a percentage age of original programming) has increased threefold. Formats adapted from shows such as *American Idol*, *Fear Factor* and *Are You Smarter Than a Fifth Grader* have undoubtedly contributed to this trend.

According to Popli, successful international outlets such as Mumbai-based Sony Entertainment Television, a subsidiary of Sony Pictures Entertainment, and Zee TV, which is Indian-owned and broadcast in Asia, Europe and the U.S., profit from a business model of 70 percent advertising and 30 percent distribution and other various incomes.

With one billion potential viewers in India, almost any niche audience is still a mass audience. As the middle class continues to grow and literacy rates continue to increase, it is expected that foreign content's market potential within India will increase at a steady pace.

As content providers look to break into this dynamic market, a well planned approach is suggested.

First, they must begin by understanding the audience. And that's no easy task! In a country home to hundreds of dialects, 28 distinct states and seven union territories, they have their work cut out for them. But it will be well worth it. Over the past decade, channels have launched and failed. Shows have come and gone. Understanding the "why" will help clarify the thinking on what type of content could work well.

Secondly, content and service providers must focus on understanding the economics of the business. There are nuances in India that make the revenue and cost structure an important area to study before entering the market. One must have a clear understanding of this.

Thirdly, companies need to absolutely find the right partners. If they're looking to enter into a joint venture with an Indian network, they might very well be on their way to a successful foray into the Indian market if they work with a local player with a proven track record, as being a foreign entrant results in significant barriers to entry from a regulatory perspective. How has the player reacted over the past decade during the aggressive phase? What content and expansion bets have they made? How have they paid off? Is the network a leader or does it follow a "me too" strategy. (Beware: many do the latter!)

Finally, companies must recruit the right talent. In a market where industry executives turnover exceeds 20 percent, it is difficult to get top notch talent. Companies have to focus on creating a compelling value proposition that attracts Indian management talent with a good understanding of content market over the last seven or eight years.

With a cautious and open approach to the Indian market, foreign companies will be well poised to tap into one of the most unique audiences on the face of the earth.

Dana Tilak is president and CEO of Bombay Pictures, a production company based in Los Angeles, currently producing *Destination Imagination*, a game show designed to bring together annually 100,000 children from 30 countries in a team building competition.

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"Shaw's Dumb Pipes"

(Continued from Cover)

in the footsteps of the Comcast-NBC deal (see our cover story) and buying a controlling stake of CanWest Global Communications.

Based in Winnipeg, CanWest is Canada's largest media company and the second-largest private broadcaster. It owns Global Television Network. CanWest operates 18 specialty TV channels and has a stable of publications, including 11 big-city daily newspapers.

CanWest Media Inc., the group's TV division, filed for protection from its creditors last October, after its parent company missed interest payments on C$4 billion worth of debt.

Shaw owns cable, satellite and Internet services and will soon expand into cellphones. This comes in addition to 17 specialty channels, 50 radio and three TV stations, as well as production and distribution companies such as Nelvana. The latter are grouped under Corus Entertainment, which was spun off as a separate, publicly-traded company in 1999. Last year, Corus, in which, Shaw reportedly has a large stake, declared revenues of C$788.7 million and net income losses of C$56.6 million with long-term debt of C$655 million.

Officially, Shaw Communications claims not to have any stake in Corus. However, according to Corus executives, "many investors hold Corus stock through several different companies." As for the B-share (traded on both the TSE and NYSE) stockholders, Corus doesn't provide details. In terms of Corus' class A voting shares, the majority are held through JR Shaw, founder of Shaw Communications.

In 2009, Shaw had a net income of C$535.2 million from revenue of C$3.39 billion. Investors in Shaw enjoyed nearly 18 percent annual gains and dividends from 2005 through 2009.

The CanWest TV deal, worth at least

Peter Bissonnette, president of Shaw Communications

JR Shaw and family

C$95 million (which for a C$10 billion company is considered a "bargain" on Bay Street — the Canadian equivalent of Wall Street), will make CanWest's television business emerge from creditor protection, since Shaw is also prepared to make cash payments to CanWest creditors. But there are more than just regulatory challenges.

CanWest acquired Alliance Atlantis in 2007 together with Wall Street investor Goldman Sachs for C$2.3 billion. In the deal there were 13 specialty channels (in addition to the five that CanWest already owned) for which Goldman retained 36 percent of the votes and 65 percent of the equity.

CanWest is now embroiled in a legal dispute with Goldman Sachs over ownership of their specialty channels. Strangely, neither Shaw nor CanWest executives briefed Goldman about the takeover, reportedly because there was a confidentiality agreement with the financial company that facilitated the bids for CanWest.

Goldman executives were "gravely concerned" that CanWest had entered into a deal without its knowledge, and for Shaw to acquire control of CanWest, Goldman had to approve it, since the 13 specialty channels are one of the key elements. Now Goldman has demanded a seat at the negotiating table, although its legal team said that the bank isn't necessarily opposed to the deal.

Besides confronting regulatory agencies and legal disputes, the Shaw strategy also includes riding out the hurdle of a competitors' bid, since the Asper family mounted a last-minute bid to reclaim control of the media group founded by their father, Izzy Asper, who died in 2003.

In order to do so, Asper's two sons, Leonard and David, and daughter Gail have teamed up with Catalyst Capital Group, a Toronto-based private-equity fund, and Goldman Sachs. David, 52, and Gail, 50, resigned from CanWest's board as soon as the deal with Shaw was endorsed by CanWest's board of directors. Leonard, 46, remained the company's CEO, a little longer, but ultimately he resigned.

This latest move came as a surprise since CanWest's broadcast assets have been shopped around for months without suitors emerging. The lack of competition was probably the reason that Shaw only requested a C$5 million break fee and a C$2.5 million reimbursement fee from CanWest if the deal doesn't go through.

It is clear, however, that Goldman Sachs wants to extract the best deal for itself, while sitting on both sides of the fence. Canada's daily *The Globe and Mail* commented: "Everything comes back to Goldman. To follow the twists of CanWest's restructuring — it has been operating under protection from creditors since October — you'd never know that Canada is a country in which, technically, it's illegal for a foreign entity to control media assets. All roads lead to [Goldman Sachs]."

Reportedly, Catalyst is providing the bulk of financing for the new recapitalization bid, while the Aspers will contribute up to C$15 million for a C$120 million bid on a 32 percent stake in CanWest Media.

However, the Ontario Superior Court overseeing the restructuring of CanWest already approved Shaw's takeover bid, calling it the "best overall offer." Once the deal is also approved by the CRTC, Canada's regulatory agency, and the federal Competition Bureau, Shaw will pick up a "minimum" 20 percent equity interest and 80 percent voting interest in a new stand-alone company that doesn't involve CanWest's newspaper division, which is itself for sale for C$950 million (the amount they are owed). Based on this investment, restructured CanWest has an implied equity value of C$475 million.

Shaw could add another 15 percent to its initial 20 percent stake if some of CanWest's creditors opt for cash in exchange for their Class A voting shares in the new company. It is expected that the Shaw-CanWest restructuring will not be completed before this coming August.

CanWest was started in 1974 when the CRTC granted a TV license to Israel "Izzy" Aspen in Winnipeg. By the year 2000, CanWest TV stations covered the whole of Canada, plus the company owned 50.1 percent of Australia's Ten Network, which was sold last year for C$634 million. Earlier, CanWest had sold its 20 percent stake in four radio stations in Turkey.

James Robert Shaw, 76, entered the television business in 1970 when the CRTC licensed his company, Capital Cable, to provide cable TV services to Edmonton. In 1972, he took the company public. Subsequently, the company was renamed Shaw Cablesystems and, having grown a great deal, moved to Calgary in 1995. In the process, the founder legally changed his name to JR and is now the company's executive chairman. JR's son Jim, now 52, took over as CEO in 1998, after running his own construction business. Today, Shaw has 10,000 employees and is traded in the Toronto and New York stock exchanges.

In addition to acquiring specialty channels and content, Shaw's deal could also pre-empt a move by broadcasters to ask for retransmission fees from cable and satellite companies.

On a different note, it is ironic that all of Canada's major TV developments spur from either Edmonton or Calgary, in the coldest parts of Alberta.

Some 27 years ago, in 1983, this reporter had to quickly leave the NATPE market in Las Vegas on a February morning to fly on a moment's notice to sub-freezing Edmonton to interview Charles Allard, then Canada's major broadcaster and producer.

That was Allard's first interview to any media (it appeared in the April Issue of VideoAge). At that time his TV group, Allarco, controlled a pay-TV service, a few TV stations, cable TV interests and produced Second City TV (sold to NBC in the U.S.).

Later, Allarco's TV stations and its stake in WIC's TV operations were sold to CanWest in 1999. Fast-forward to February of 2010, when this reporter was in Canada. Edmonton came back in the picture, once again as Canada's key TV group, when the news of the Edmonton-Calgary's Shaw takeover of CanWest broke out.

Officially, Shaw Communications claims not to have any stake in Corus. However, according to Corus executives, "many investors hold Corus stock through several different companies.

Comedies, Cops and Copycats

(Continued from Cover)

and the CW, with an almost even match-up of 42 dramas and 39 comedies.

"There is a big appetite for comedies this year," said Keith Le Goy, president, International Distribution, Sony Pictures Television (SPT), noting that the still-unstable U.S. economy makes many people happy to leave their real lives behind for a half-hour laffer. "In times of uncertainty viewers typically turn to comedy."

But it isn't just the economy drawing people to the funny side of television. The mammoth success of freshmen ABC sitcoms *Cougar Town*, *The Middle* and *Modern Family* has prompted the other networks to try and duplicate the Alphabet Net's ratings success. "Networks may not emulate the exact [documentary-style] formula of *Modern Family*," said Le Goy, "but they will definitely try and replicate the array of characters, the real-life situations, the moments that have heart."

ABC is in the lead with 12 comedies, including SPT's own *Mr. Sunshine*, which stars Matthew Perry as the self-absorbed manager of a sports arena; as well as *Freshmen*, a multi-camera series chronicling the lives of three first-year members of Congress; and *It Takes a Village*, a sitcom about two exes and their partners who team up to raise a 15-year-old boy. Fox has nine comedy pilots in the works, including multi-camera series *Nirvana*, about two Indian brothers and their romantic lives, and *Strange Brew*, which revolves around a family that owns a small brewery. NBC and CBS also have nine sitcoms each. The Peacock Net boasts *Beach Lane*, starring Matthew Broderick as a celebrity author hired to run a Hamptons newspaper, while the Eye Network is confident that it can strike comedy gold with *Mike and Molly*, a multi-camera laffer from producer Chuck Lorre (*The Big Bang Theory*, *Two and a Half Men*) about a couple that overeats.

While comedy appears to be king this time around, the international TV community has always had a preference for more serious fare. "[Dramas] translate better," said Marion Edwards, president, International Television, Twentieth Century Fox Television Distribution.

She won't be disappointed as an eclectic array of drama pilots are also on offer, including the customary deluge of police and legal shows. Fox has *Ride Along*, an ensemble about a veteran police officer and his rookie partner; *Breakout Kings*, a procedural that pairs marshals with ex-cons to catch bad guys; and *Pleading Guilty*, a legal series about a former police officer who's now a partner at a top Chicago law firm. NBC boasts U.S. Marshals-centered *Chase*; Undercovers, in which a couple is yanked out of retirement to work for the CIA; David E. Kelley's *Kindreds*, a drama focusing on an ex-patent lawyer and a rather bizarre law practice; and *The Cape*, about a onetime cop who wears a superhero uniform in order to clear his name. CBS has a still-untitled series about a family of police officers in New York; *Defenders*, about two Las Vegas attorneys; and *I Witness*, about a detective-turned-professor who solves crimes. ABC has *187 Detroit* and *True Blue*, both of which focus on homicide detectives; *The Whole Truth*, a legal drama from Jerry Bruckheimer; and an untitled series about a detective team made up entirely of females. Even the CW is getting in on the action with *Nomads*, about a group of backpacking youths who moonlight for the CIA.

"There is always a good amount of [police and legal shows], but this year, they are by far the majority," said SPT's Le Goy, who also pointed out that "there are fewer medical shows than usual due to a lot of development in that arena last year." Regardless, the CW has a still-unnamed series focusing on first-year students at Harvard Medical School; CBS has a drama about a mobile medical team; and ABC has *Off the Map*, a show about three physicians who work at a tropical clinic.

While medical shows are on the outs, remakes are hot commodities — despite poor performances by recent reboots of such shows as *Melrose Place* and *Bionic Woman*. The CW is offering up *Nikita*, a modernized *La Femme Nikita*. CBS has *Hawaii Five-O*, an update of the 1960s hit that centered on the Hawaii State Police. And NBC has *Rockford Files*, based on the '70s private eye series.

Marion Edwards, president, International Television, Twentieth Century Fox Television Distribution

"There's a comfort in the past and in trying to restart a franchise," said Twentieth Century Fox's Edwards. "When the brands of yesteryear are looked at again, one might catch on and work." Echoed Le Goy: "Remakes can be attractive because they have been successful in the past, of course, and there is less of a marketing hurdle because the shows are recognizable brands. When new shows have to perform quickly, it can give them a leg up in communicating what the show is." However, he added, "Ultimately, a good show is a good show."

Indeed, a show has to live up to expectations and then some in order to succeed in today's competitive television landscape. While some producers turn to remakes of series from days gone by, others find themselves drawn to ratings hits from around the world. In past years, network television has found success with *The Office*, which was based on a beloved U.K. series, and *Ugly Betty*, a dramedy that first came to life as a Colombian telenovela. This year, Israel appears to be the country of choice, with a duo of Holy Land series being touted as America's next big format hits. CBS is adapting *The Quinn-Tuplets*, a drama about five adult quintuplets that's loosely based on Israeli series *Reviat Ran*, while Fox is reworking *Traffic Light*, a single camera comedy that centers on three men and their romances, for U.S. viewers.

"There will always be interest in formats that have proven track records," said Le Goy when asked about the foreign phenomenon. "A big key to their success is the ability to take what worked in the original version and make it accessible to a different audience with a different culture. This is something [SPT] knows first-hand from taking U.S. scripted formats like *Married... with Children*, *The Nanny* and *Everybody Loves Raymond* to other countries with great success." He continued: "We live in an era of greater cultural global awareness so it's great that U.S. networks are looking for ideas from around the world, and broadcasters outside the U.S. are interested in adaptations of U.S. series."

Although we won't know which prospective series will see the light of day until the networks' upfront presentations in May, one thing seems clear: Jay Leno will be kept as far away from primetime as possible.

NBC'S The Office *was based on a beloved U.K. series*

Keith Le Goy, president, International Distribution, Sony Pictures Television


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Comcasting NBC Opens Floodgate

(Continued from Cover)

cancelled. Soon after, Conan O'Brien (who used to host his own show at 12:30) was ousted as the host of the 11:30 PM *Tonight Show*, which was then handed back over to Leno.

But the biggest development of all took place behind the scenes. While the late night war raged, Philadelphia-based cable channels operator Comcast Corp. was busy buying out NBC Universal from GE and becoming the network's majority interest. The deal that valued NBCU at $30 billion, was announced on December 3, 2009, but at press time, hearings with the FCC were still underway to determine its legal and regulatory ramifications. *VideoAge* took a look at the acquisition to determine the pros and cons for both parties, and the implications for the industry at large as well as consumers.

Comcast is the U.S.'s largest cable operator, with revenues of $36 billion in 2009. Additionally, it runs 10 specialty channels (like E!). The NBCU merger is not the first time the cable giant has gone after a combination studio/network. In 2004 it failed on a $54 billion hostile bid for Disney. Such mergers could be in the company's DNA, considering its name is an amalgamation of the words communication and broadcast. But Comcast has more serious reasons for wanting NBCU, apart from the loss of cable subscribers that amounted to 233,000 in 2009 alone (out of 24 million).

Comcast faces threats from online video, competition from satellite, phone companies and even theater owners who don't want to see the cable window get too close to film releases. As a distribution (or "dumb pipes") service, it also competes with Wi-Fi operators as well as telcos. Margins on content are reduced by the per-sub fee it pays to channels, the retransmission fee requested by TV stations and by content owners who demand a bigger cut.

For its part, NBC is the General Electric-owned entertainment group that includes Universal Studios. NBCU is part of a media group with 2009 revenues of $15.44 billion. The group includes TV network (NBC), a film and TV studio (Universal), eight specialty channels run under NBC (including Bravo and USA) and five specialty channels under Universal. Also run under NBCU are CNBC and, in partnership with Microsoft (18 percent stake), MSNBC.

Brian Roberts of Comcast

Executives from both sides were tightlipped on the subject of the deal, declining to comment until proceedings with the FCC drew to a close. A rep from Comcast stated only that "[we're] going through the regulatory process" and attending "more meetings in the next two weeks."

However, Brian L. Roberts, chairman and CEO of Comcast Corp. as well as the son of the company's founder, and Jeff Zucker, president and CEO of NBCU issued a statement last February to the House Committee on Energy and Commerce Subcomittee of Communications, Technology and Internet highlighting some of the deal's key points.

For starters, the Peacock Net will keep the name "NBCU" despite the fact that Comcast will own 51 percent of the company (GE will retain 49 percent). According to the statement, the deal "will combine in a new joint venture the broadcast, cable programming, movie studio, theme park and online content business of NBCU with the cable programming and certain online content businesses of Comcast." The statement asserts that "the new NBCU will benefit consumers," elaborating that its acquisition by Comcast will encourage much needed investment, which will in term fund innovation.

Reportedly, for its 51 percent Comcast is expected to pay NBC some $3.7 billion in cash, merge its $7.25 billion worth of cable channels into a spun-off NBCU and carry $9.1 billion of debt to the new company. GE has the option of unloading half its stakes in 42 months and all of it in seven years. In addition, the new NBCU company would borrow the $9.1 billion that would partially go toward covering the money GE owes Vivendi. French company Vivendi owns the 20 percent of NBCU that GE committed to acquire for $5.8 billion in order to go through with the Comcast sale. Of that, $2 billion is payable this coming September if the deal hasn't closed by then, and the remaining $3.8 billion would be due at closing.

Comcast would name three people to the board of the new company and GE two. Comcast would manage the joint venture. Zucker would remain CEO of NBCU and report to Comcast COO Steve Burke.

All this, of course, is pending Washington's approval. In order to obtain the green light from the government, Roberts and Zucker were eager to explain how the deal will advance some of Congress' key policy goals on "diversity, localism, innovation and competition." However, critics, many of them government officials, have nevertheless derided it as anti-competitive and monopolistic. The fear among naysayers is that the acquisition will be yet another step towards the major media companies being owned by just a few individuals.

Roberts and Zucker countered such arguments by emphasizing that the transaction will be a "vertical combination of NBCU's content with Comcast's multiple distribution platforms." In today's media landscape, the two argue, the new NBCU will still "face competition from a growing roster of content providers," and competition from distributors will be as fierce as ever. Nevertheless, there's widespread concern that the corporate juggernaut could put smaller media companies, Internet entrepreneurs and independent producers out of business.

The deal also raises a number of concerns from the consumer's perspective. Early February marked the beginning of Senate and House hearings on the merger, and Roberts and Zucker were met with widespread censure. At the Senate Judiciary Committee hearing, Wisconsin Democrat Herb Kohls demanded to know "how the creation of this media conglomerate will serve the interests of the American people, not just the interests of [the involved] companies."

The House Commerce Committee's subcommittee on the Internet had a similar tone, with Mark Cooper of the Consumer Federation of America giving a statement predicting that the merger would "radically alter the structure of the video marketplace and result in higher prices and fewer choices for consumers."

Representative Edward Markey, a Democrat from Massachusetts and a senior member of the subcommittee commented, "The issue before us boils down to the seven C's: Will this Combination of Communications Colossi Curtail Competition and Cost Consumers?"

Kohl's, Cooper and Markey, as well as a number of other officials echoed the worries of many consumers that the deal will give Comcast leverage to raise the cost of cable. Additionally, there's the possibility that Comcast will convert NBC into a pay-TV or cable channel like its other properties, rather than leave it as a free, over-the-air channel. Such a scenario would be a detriment to those who cannot afford cable, depriving them of local news as well as entertainment programming. However, Comcast's Roberts made statements denying that his company has any intention of changing the channel's distribution format. Comcast's only motives, he said, are to restore and invest in NBC.

NBC's Jeff Zucker

As for the Internet, the fate of web distribution platform Hulu.com is also uncertain. NBC holds a 32 percent stake in Hulu, which streams the network's content for free. Meanwhile, Comcast owns as similar site called Fancast. Concerns for Hulu are two-fold: that it will disappear altogether, or that combined with Fancast it will create too large an entity that will crush competition. Roberts and Zucker dismissed the latter worry, assuring the Committee that Fancast garners less than one percent of the online viewing audience.

Though Comcast and NBC face a minefield of obstacles and potential pitfalls, the merger is not without its upside. NBC has been saddled with a parent company whose core business is not entertainment since GE's acquisition in 1986. It could certainly be better served by an owner in the business of media. NBC has lately faced growing problems, including increased distribution costs of network of TV affiliates that are not necessarily needed. It depends mostly on advertising revenues and cannot get full retransmission fees as long as it needs to position its dot channels on cable. Additionally, in recent years GE has been reluctant to open its purse strings for quality programming. Many think that it was this overly frugal programming scheme that led to the creation of the cheaply produced *Jay Leno Show* on nightly primetime. **ES**


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Air Travel Less Painful

A 2009 survey by Zagat (www.zagat.com/airline) proved that all airlines are basically uncomfortable, unfriendly and unaccommodating. "The major domestic airlines are becoming more and more like Greyhound buses in the sky," researcher Tim Zagat is quoted as saying. Therefore, the only parameter for selection is price: Fly with the cheapest carrier and be unhappy! However, only 61 percent of the respondents cited low cost as a factor. Seat comfort preference was also surprisingly low at 51 percent, while direct routes received high marks at 68 percent. The survey involved 16 U.S. and 73 international airlines. Among the top-rated economic seating were JetBlue for U.S. travels and Singapore Airlines for international.

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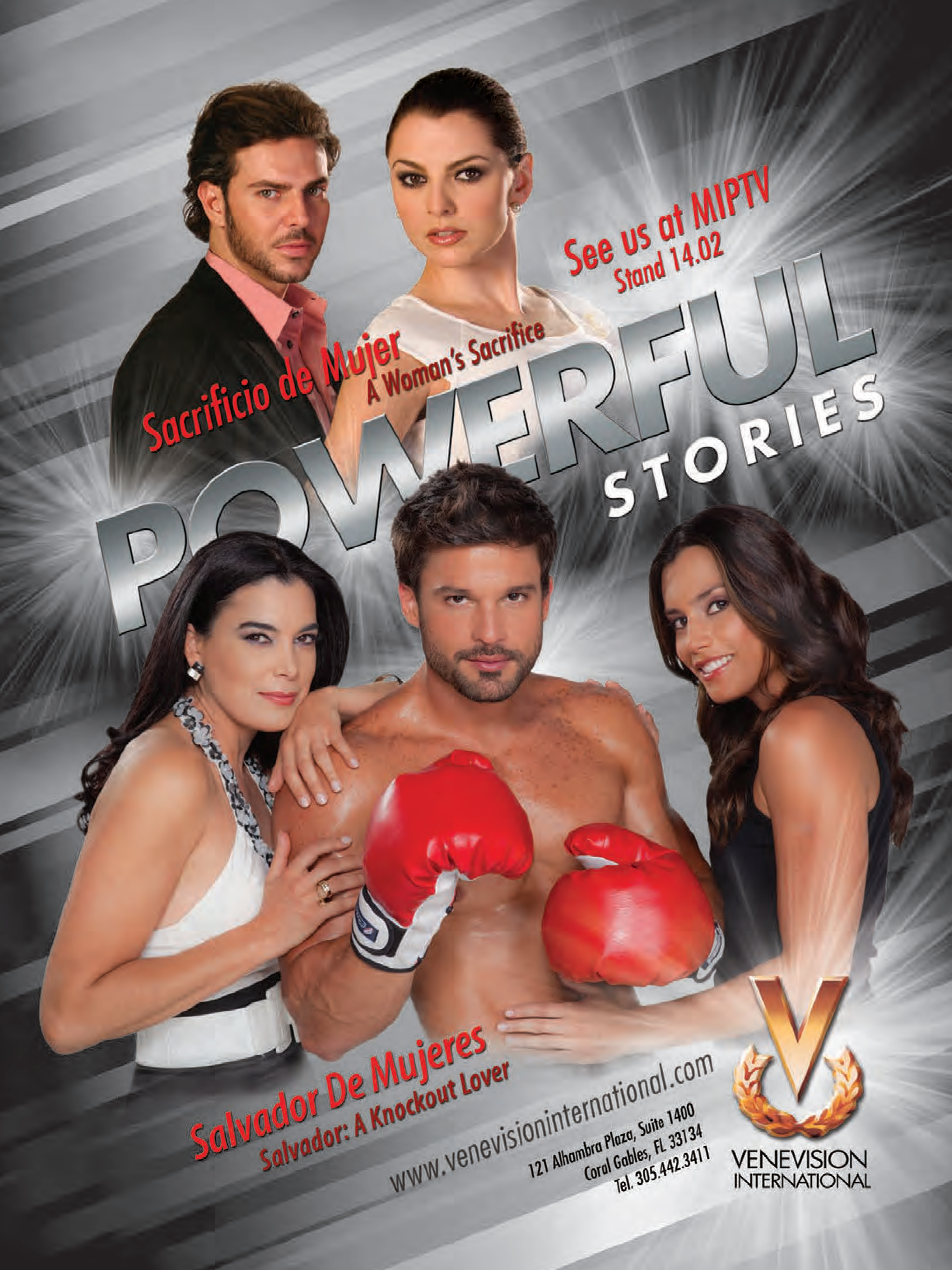
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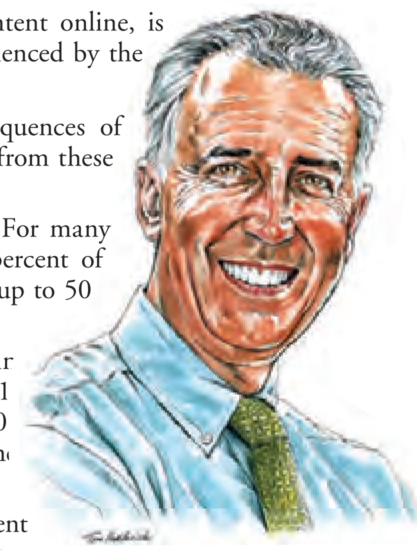

Did you hear the latest? Apparently the recession, combined with free content online, is hurting the porn industry. If one compares this new trend with that experienced by the music industry, you've got *déjà* vu all over again.

First the music business and now the porn industry paid the consequences of speedy broadband. Can the film and TV industry draw some conclusions from these outcomes?

Digital platforms now account for 20 percent of recorded music sales. For many companies in the porn sector, 98 percent of business is streaming. In music, 95 percent of downloads are illegal. For porn, free streaming caused a drop in revenue estimated at up to 50 percent since 2007.

According to Internet traffic ranking service, Alexa.com, six of the 100 top websites in the world are "tube sites," portals for free pornography (respectively ranking 28, 55, 61, 63, 93 and 98). Compares those to sites such as AOL (ranking 43), BBC (44), CNN (60) and The New York Times (91). However, in the music sector, only one site ranks in the top 100.

Even so, there are many similarities between the music and adult entertainment industries. With downloads, music listeners can pick and choose the songs they want, as opposed to paying for the whole album. Because of porn streaming, "customers do not want to watch entire movies," wrote *APC*, the Australian PC magazine, "they want to watch scenes."

The average age of music consumers (55 percent) is over 30. According to Forrester Research, the average age of online visitors to adult sites is 41.

However, there are also differences. Music listeners like to download tracks because they want to own them. With porn, streaming is preferred because consumers don't want clips stored on their computers.

Music downloads represented $2.7 billion in 2008, out of an industry worth $13.5 billion per year. According to *The Los Angeles Times*, "none of [the porn streaming sites] appear to be making much money" in an industry valued at up to $13 billion a year (until recently).

The porn business spearheaded the growth of video business for film studios, not television. Similarly, the adult programming business provided big spurts for both the growth of Internet and broadband, more so than traditional television.

In addition, the adult industry represented a huge profit center for mainstream businesses such as hotel chains, cable and satellite companies, Internet providers and DVD rental stores.

The above preamble is meant to summarize how Internet and broadband changed two similar businesses which originally helped the growth of both technologies.

Were these industries shortsighted? Did they shoot themselves in the foot? Were the AM radio stations shortsighted by spearheading the development of FM with their all-music programs?

Were the TV stations that allowed their programs onto cable systems doing the same? Of course not. The industry should have learned that embracing a new technology can become a new profit center, based on the experiences of U.S. studios that fought the introduction of the VCR.

In the music business, while the Internet was eroding its traditional promotion and distribution networks (radio and record stores), the industry refused to empower an entire universe of micro distributors online who could have completely and profitably redefined the mode. The problem, however, wasn't just with distribution, but also with packaging and content, since consumers did not want to pay for whole albums when they were only interested in select tunes. As far as content is concerned, it has been said that for the recording artists of the 60's for example, lyrics became more personal, song formats changed and rules were broken.

Two years ago a game developer asked a simple question on his blog: Why do you pirate my games? The responses were broken down into several categories. Some people viewed all intellectual property as fair game or were too broke or cheap to buy content (people who will never be convinced to pay), and people who thought his games were too expensive or the demos too short for them to feel confident that they were going to get a reasonable value for their money. Now, what can the TV and film industry learn from these experiences?

New media is just re-purposed old media, a de-bundling of programming, and I agree with the statement, "YouTube is a video repository, not an entertainment network."

The Internet has created a new generation of producers who are taking media to a different level. Not necessarily better, just different.

The television industry has to be supported by advertising, especially brand advertising, which depends on a close connection with the audience, and TV knows how to create and maintain this connection.

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